DOCUMENT RESUME

ED 462 602 CE 083 055

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TITLE	What Convinces Enterprises To Value Training and Learning and What Does Not? A Study in Using Case Studies To Develop Cultures of Training and Learning.
INSTITUTION	National Centre for Vocational Education Research, Leabrook (Australia).
SPONS AGENCY	Australian National Training Authority, Melbourne.
ISBN	ISBN-1-74096-010-6
PUB DATE	2001-00-00
NOTE	124p.; Case studies are appended.
AVAILABLE FROM	National Centre for Vocational Education Research, 252 Kensington Road, Leabrook, South Australia 5068, Australia (Cat no. 707 (report): $27.50 Australian; Appendix available only on web site). Tel: 08 8333 8400, Fax: 08 8331 9211; e-mail: vet_req@ncver.edu.au; Web site: http://www.ncver.edu.au. For full text: http://www.ncver.edu.au/cgi-bin/gda.pl?id=2133/research/proj/nr90 16.pdf (report) and http://www.ncver.edu.au/cgi-bin/gda.pl?id=2134/research/proj/nr90 16a.pdf (appendix).
PUB TYPE	Reports - Research (143)
EDRS PRICE	EDRS Price MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	*Attitude Change; *Case Studies; Change Strategies; Cost Effectiveness; Definitions; *Educational Attitudes; Educational Research; *Employer Attitudes; Feasibility Studies; Foreign Countries; Guidelines; Informal Education; Job Training; Learning Processes; Marketing; Models; Organizational Change; Organizational Climate; Postsecondary Education; Research Methodology; *Research Utilization; Role of Education; School Business Relationship; Secondary Education; Training Methods; Training Objectives; *Vocational Education
IDENTIFIERS	*Australia; Educational Marketing; Learning Organizations

ABSTRACT

A study examined the feasibility of using case studies to convince enterprises to value training and learning. First, 10 Australian enterprises were studied in sufficient depth to construct a comprehensive picture of each enterprise, its culture, and the strategies it uses to develop the skills and knowledge of individual employees and the organization as a whole. Next, the case study findings were presented to 10 different enterprises. Those enterprises were asked to identify what in the materials convinced them that rethinking their own approaches to training and learning might prove profitable. Most enterprises considered informal strategies for skill development more important and effective than has been acknowledged by Australia's vocational education and training sector. The enterprises also liked the cost-effectiveness and flexibility of informal strategies. The following were among the key findings: (1) real and detailed examples should be used when attempting to convince enterprises to rethink their approach to training and learning; (2) although enterprises are concerned with calculating returns on investment in training and learning, they do not

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necessarily need to see the impact directly in dollars in their bottom line; and (3) personal interaction is the most effective channel of communication with enterprises. (The bibliography lists 64 references. The 10 case studies are appended.) (MN)

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ISBN 1 74096 010 6 print edition
ISBN 1 74096 011 4 web edition
TD/TNC 68.07

Published by NCVER
ABN 87 007 967 311
252 Kensington Road, Leabrook SA 5068
PO Box 115, Kensington Park SA 5068, Australia
www.ncver.edu.au

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Executive summary

This study of training/learning cultures in small to medium-large sized enterprises was funded as part of the National Centre for Vocational Education and Training Research and Evaluation Strategy. It had two purposes:

1. to better understand the concept of *cultures* of training and learning in enterprises
2. to investigate what makes case studies and other information about exemplar enterprises interesting and convincing enough that other enterprises will follow their lead

The project proceeded in two stages. Stage One focussed on studying ten enterprises in enough depth that we could construct a comprehensive picture of each enterprise: its culture and the strategies it used—including *why* those strategies were used—to further develop the skills and knowledge of individual employees and of the enterprise as a whole. In Stage Two, material capturing the most interesting and important ideas about training and learning emerging from Stage One was given to a new sample of enterprises. These enterprises were asked to look at the material and give us feedback about what, if anything, they found that convinced them they might profit from rethinking their own approaches to training and learning.

Enterprise culture: The importance of informal learning

When people in enterprises described their experiences of training and learning, the outstanding feature was how important informal processes were to them. When our respondents, who ranged from shop floor workers to senior managers, said 'informal' they meant simply the opposite of formal structured training. They considered formal training to be that which is organised by an expert who has clear expectations of what skill or knowledge is to be learned—whether certified or not, long or short, self-paced or classroom-based. Through further questioning, it became clear that 'informality' refers to two different aspects of learning and training:

- the specificity of the *outcomes* expected: Outcomes can be tightly specified (e.g. everyone who works at this hospital, including volunteers, must understand and live its values and mission). Other times intentional learning opportunities are set up but the exact learning outcome is not determined in advance (e.g. when workplace teams are created or employees put together to solve a workplace problem).
- the formality of the guidance given the learner: Guidance can be as loose as a casual conversation walking to the car park: 'is that how *you* do it …?'; or more intentional through mentoring, network meetings, job enrichment, modelling, etc. The processes are all relatively informal but the final outcomes can be—although need not be—formally specified either in advance through annual performance reviews or retrospectively in an RPL process.

The enterprises' interest in informal approaches is *not* meant to denigrate formal approaches to training and learning—almost all of them used both. In fact, the point made time and again was that the two approaches need to be used in concert. Informal learning amplifies the value of formal training but informal learning by itself runs the risk of restricting people to old ways of thinking and working.

The majority of enterprises in both stages of the study felt that informal strategies for skill development and expanding the knowledge available to the enterprise is more important and effective than the Australian vocational education and training (VET) sector acknowledges. Information provided to enterprises by authorities in the sector tends to ignore informal processes. To enterprises it appears that the sector is interested in selling its own product (formal training) and not in developing their capacity to grow using a range of approaches.

Where the enterprise is large enough to have an in-house expert in training/learning, it can negotiate between the external formal program and internal informal mechanisms. Many of the companies that could most profit from consistent skill growth do not have such expertise.

The enterprises in our study also pointed out that formal procedures are often costly while informal processes appear to be more economical. They also made it clear that many formal training programs are still very inflexible.

Enterprise cultures that amplify the value of training and learning

While there is an extensive and well-documented literature on the culture of groups in general and on the cultures of organisations and workplaces in particular, we deliberately went into the Stage One enterprises without a precise definition of culture—indeed, without any preconceptions of what we might find about training, learning or culture in the enterprises.

What became abundantly clear in analysing the data collected in Stage One was that there was *something* about many of the enterprises that made the training and learning they engaged in, formal and informal, deliver special value to both the employees and the enterprise itself. In these enterprises:

- people talk to one another about what they have learned
- people are willing to share their knowledge and expertise
- skill, knowledge and information are *applied* to the work at hand—where necessary the organisation shifts so the new skill and learning can be applied
- many different forms of learning are used and supported (from the formal certified course to lunch-time meetings and modelling) and they are accessible to those who need or want them
- everyone in the enterprise is accorded genuine respect
- there is a can-do climate—that it is *not* all too hard, too daunting, too much trouble
- the environment encourages and supports people pushing at frontiers, taking justifiable risks
- there is genuine curiosity about solving problems together

Other Australian research has also noted these characteristics, as documented in detail in the full report.

We concluded that there are enterprises where the culture—the way people relate to one another, the way they co-operate and show respect for one another, the way they afford opportunities to one another—amplifies the usefulness of training and learning. These are cultures where the environment itself stimulates learning, where the whole of skill and knowledge becomes greater than the sum of its parts. In these enterprises training and learning, quite literally, work.

A question remains, however. If there are cultures in some enterprises which enhance the value of training and learning, what do we call such cultures? Does the enterprise have a training culture? Does it have a learning culture? Does it simply have a supportive culture? Having reviewed the recent literature on the subject, and in light of our study, we have become convinced of two things:

- The idea of a *training* culture is too narrow a concept and aspiration. For several years leaders in the VET sector have urged enterprises in Australia to establish training cultures. The development of a highly skilled and enterprising workforce *is* critically important to any enterprise but, even taking a broad definition of training, there are too many aspects of capacity building, skill development and deployment, workplace learning and knowledge generation which do not fall within the meaning of a 'training culture'.
- The idea that each enterprise should develop a *learning* culture better captures the sense that a broad and dynamic engagement with knowledge and innovation is needed. Indeed, the phrase 'a learning culture' is in common use and appears to be an ideal that is widely admired. The problem with the phrase is that it has an air of sloganeering about it: another

fad will inevitably come along. Additionally, learning—like training—is only a tool for achieving business ends (which can, of course, include worker morale and community obligation). It would be inappropriate to insist that the *most* important aspect of an enterprise's culture is that it delivers learning.

The fulcrum on which the capacity of an enterprise to gain maximum value from training and learning—formal and informal—turns is its climate of interpersonal relations. The best way to convey that is not by the shorthand of labelling an enterprise's culture as either a 'training' or a 'learning' culture but by pointing to the central action saying: this enterprise has a culture which amplifies the value of training and learning through its interpersonal relationships. In the small to medium-large enterprises we spoke to, the point that it isn't training alone nor learning alone but the dynamics of the relationships within the enterprise that is the key was readily understood and appreciated.

What was convincing about the Stage One cases?

Three features of the material presented to Stage Two enterprises on the basis of the case studies of Stage One enterprises seem principally responsible for attracting, and holding, their attention:

1 **The wide scope of the Stage One cases and the element of freshness about them.**

These enterprises were not the big well-known names. There was an element almost of delight in respondents 'discovering' and being invited in to these places. And each of the enterprises had interesting, insightful experiences to share. The ten Stage One enterprises were:

Harvey Beef, Harvey, WA – a family-owned meat processing plant with 510 employees and a growing export market. It underwent a major change in thinking about training and learning.

Harvey Newsagency, Harvey, WA – a newsagency in a small country town. This is hardly rocket science, but a considerable amount of training and lively learning happens.

O'Reilly's Rainforest Guesthouse, Lamington National Park, Queensland – a family-owned business, almost an institution since 1926, which has moved in several new directions with corresponding dilemmas.

Pretzel Logic, Perth WA – a rapidly expanding web design company facing all the IT industry's problems such as tools and knowledge changing almost daily, talented people leaving, and a frenetic work pace.

St John of God Hospital, Subiaco, WA – has an enviable reputation amongst patients and employees as a caring place, despite the fact that it faces the same financial pressures as every other Australian hospital.

Salty Seas, St Helens, Tasmania – the enterprise was originally created as a training program for unemployed youth in the area. It is now a prospering private company processing oysters with many of the original trainees now managing it.

Simplot Kelso, Bathurst. NSW – produces all the fish fingers in Australia. The company has been through some difficult times (which people at the plant now call 'the dark ages') but things are being turned around.

South Sydney City Council, Sydney, NSW – the Council, a large and diverse organisation, illustrates many of the problems which need to be overcome in trying to generate a culture where individuals are comfortable sharing their knowledge.

Stelform Engineering, Newcastle, NSW – designs and fabricates pressure vessels; the managing director decided, for hard business reasons, that people's 'soft skills' needed improving, especially, their capacity to talk about sensitive issues.

University of Wollongong Library – has managed to forge a cohesive and impressive whole amongst its wide range of employees in an environment of diminishing resources by taking 'investing in people' seriously.

2 **The material was 'honest' and 'real'.**

We were determined that the material would not be trivialised 'good news stories' but would honour the complexity of the Stage One enterprise's achievements and articulate the challenge ahead for the Stage Two enterprises. We dealt with questions which we know concern businesses: that trained employees will be poached; that some employees don't want to be trained; that training might well have been tried before with disappointing results. None of the Stage One enterprises had a mistake-free run in establishing a culture which amplifies the value of training and learning.

It cannot be emphasised too strongly that we won the trust of the Stage Two enterprises by keeping the material firmly bedded in real people's experience and *not* patronising, generalising or over-simplifying the issues. The material itself was contained in a professionally designed 130-page booklet titled *Building on other people's experience.*

3 **We talked to the Stage Two enterprises.**

A number of the Stage Two interviewees commented that our visit to discuss *Building on other people's experience* created a deadline without which the booklet might never have reached the top of their 'to do' list. While that deadline was far from irrelevant, the true value in meeting with the respondents was that the conversations themselves became lively learning experiences. As we probed their ideas and they probed ours, their interest in thinking about their approaches to training and learning was visibly engaged and energised.

It needs to be recognised that not all 19 of the Stage Two enterprises were equally convinced by the material. In terms of their future intentions, three roughly equal sized groups could be identified. The enterprises in the first group found the booklet interesting to read and think about but they were not inspired to change their approach to training *at this time*. Enterprises in the second group picked out 'snippets' of new ideas they wanted to try. Those in the third were stimulated to reflect quite deeply about what they were doing.

What is interesting is that there was no pattern to this difference amongst enterprises in terms of their size, industry, location, business environment nor the amount of training/learning they currently engage in. The single difference is rather simple. The least interested enterprises were *satisfied* with what they were currently doing in terms of training and learning. The most interested ones were all doing well in a business sense—so they have confidence to build on—but they were ambitious to do better, and to do better by working differently.

Lessons for marketing training and learning to Australian enterprises

The key lessons to emerge from this study in marketing the value of investing more in training and learning to Australian enterprises are:

- in using exemplars to convince enterprises to rethink their approach to training and learning, the examples need to be real and detailed. Rosy, good news stories that make training and learning a panacea are patronising and ultimately unconvincing. People will make up their own minds about what to take from other people's experience if that experience is presented fully
- calculating a return on the investment made in training and learning is an issue of concern to enterprises but that does not mean they have to see the impact directly in dollars on the bottom line. Much of the workforce change wanted is in the ways employees think about their jobs, think about how the work could be done better. Many of the tools for effecting that change are incremental and intangible. In other words, both the change wanted (the outcomes) and the interventions (inputs) are of a qualitative nature and not readily costed in dollars. What enterprises need to 'calculate' their return on investment is help in deciding what indicators of change they might observe and whether the employees themselves recognise that they have learned and applied that learning. They need proximal not distal indicators of change
- a key message to convey is that the kind of culture an enterprise has, and particularly the tenor of interpersonal relations throughout the enterprise, shapes the value of the investment in training and learning
- the most effective channel of communication with enterprises is personal interaction—above all because it allows for conversation and the 'receivers' of messages about training and learning have the opportunity to think out loud about how the information might apply in their circumstances
- there are people throughout most enterprises who have an interest in training and learning. These people should be consulted along with senior management about training

and learning. They are often far more critical to making decisions about skill and knowledge development, and certainly to encouraging employee engagement, than management.

As this summary indicates, the study has been a rich and productive one. It has provided robust evidence of the critical importance of informal learning and new insights into the ways small and medium-large sized enterprises create cultures where the value of training and learning is amplified. Stage Two enterprises said they were convinced at least to think about their current approaches to training and learning because the information from the Stage One cases was frank, generous and authentic. The Stage Two enterprises in the study had the sense that they were learning directly from the Stage One enterprises without the information being mediated by people with an agenda—they trusted the researchers were not distorting things.

A final word: our appreciation is extended to the many men and women we spoke with in both stages of the study. They were thoughtful, gracious and very honest. It was a privilege, and a pleasure, to meet them.

This report is available from the NCVER website as a pdf file:

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Introduction

Background to the study: Its dual purpose

As part of its overall strategy to build a systematic research base, the National Research and Evaluation Committee (NREC) identified enterprise culture as a significant 'ingredient' in the take-up—and, as it turns out, in the effectiveness of—training and learning. Therefore, NREC in its 1999 funding round nominated as one of its key research priorities, the study of training/learning cultures in enterprises.

It was already clear from a wide range of recent work (for example, Hayton et al. 1996; Field 1997; Australian Bureau of Statistics 1998; Schofield 1998), some of which was sponsored by NREC, that there is great variability in the extent to which small and medium-large sized enterprises engage in training. The differences observed could be attributed to a number of independent factors—among them: whether the enterprise faces skill shortages; whether it is subject to changes in technology, management practice or quality assurance; the nature of the company's market ambitions; the availability of training; the cost of training; the immediate financial pressures bearing on the company; the extent of poaching in the industry; worker turnover; union relations; government policies, regulations, incentives and such like. None of these factors is particularly surprising and it is clear that each makes a contribution to the decision by an enterprise and by individuals in the enterprise to engage in training.

There remained a question, however, of whether the development of a strong long-term training and learning *culture* in an enterprise is merely the sum of favourable factors/drivers (and the absence of unfavourable ones) or whether a *culture* requires some additional features which lift the commitment to training so it becomes greater than the sum of the contributing parts. Many people in the VET sector, including members of NREC, knew of enterprises that seemed just to *believe* in the value of training while other—apparently identical—enterprises did not. Most had heard of the experience of 'believing' managers/owners who had tried very hard to convince their 'non-believing' colleagues to 'try training' but their arguments had fallen on deaf ears.

The study we undertook, therefore, had a dual purpose. The first was—through a series of case studies of small to medium-large sized enterprises—to understand the training/learning cultures of those enterprises: what training and learning was accessed by the enterprises and *why* managers and individuals did so. The thinking behind their training/learning decisions was as important as the training/learning itself.

The second purpose of the study was to understand how best to use case study material in convincing other enterprises to think about their approaches to training and learning. The example of managers who failed to persuade other managers in the same chain or even the same company to consider doing more training had made a deep impression on us. As had the number of people who had told us that when they hear 'good news' stories of companies with dramatic outcomes from training, their reaction was often to decide the exemplar had some special talent which they unfortunately lacked. They actually became less, rather than more, inclined to follow the training path example.

Case study research of exemplar enterprises is often undertaken in the VET (and other education) sectors with the assumption that when other enterprises and individuals read or hear about the exemplars, they will be inspired to rethink their own approach to training and learning. However, the research never actually tests the efficacy of those stories in influencing the thinking and future actions of other enterprises. This study was designed to take that vital next step.

Understanding cultures of training and learning—the first purpose

The burgeoning interest in workplace culture is being fuelled by the new global economy. It is fundamentally shifting the nature of services and products in demand (or for which a demand might be created) and the technologies of production and communication. This requires concomitant changes in most, if not all, enterprises. It demands more skilled, dynamic and innovative work. As Schofield (1998, p.11) noted, such changes cannot occur by fiat:

> *The burgeoning use of 'culture' in organisations reflects recognition that many organisational changes in structures, functions, business processes or systems do not achieve their goals because they neglect or give inadequate attention to ways in which the organisation can earn the commitment, loyalty and trust of employees at all levels.*

If enterprises are to be dynamic, innovative and entrepreneurial, much more responsibility and control needs to be delegated to workers. This, in turn, requires a shift from traditional patterns of workplace relationships:

> *Taylorism's principles of scientific management contained an implicit premise that there were economies of scale in managerial intelligence and that an organisation could be more efficiently operated if its intelligence were segregated in a hierarchy rather than being distributed throughout the organisation … in such a system there was no need for trust, social capital—workers could be motivated by purely individual incentives.* (Fukuyama 1999, p.224)

Fukuyama goes on to explain that where individuals are expected to work together on complex tasks without formal direction, they need to organise themselves so that co-ordination 'bubbles up' from below. This can only happen when people are able to establish relationships of trust and robust networks.

There is a growing expectation that workers will put 'more of themselves' into their work. Noon and Blyton (1997, pp.121, 123) describe the growth of what they call 'emotion work':

> *In most service occupations involving direct contact with the public—for example, airline cabin crews, health care workers, supermarket check-out operators, bank staff, debt collectors—the way in which employees deliver that service has come to represent an increasingly important aspect of that service … employees are explicitly required to adopt particular sets of 'emotion rules' which define—often in considerable detail—which emotions they must publicly display and which to suppress.*

Since workers' capacity to meet these demands is shaped by the internal environment of the enterprise, it is little wonder that workplace culture is highlighted when enterprises attempt to initiate change.

On the other hand, the word *culture* is, as Raymond Williams is widely quoted as saying, 'one of the two or three most complicated words in the English language' (Fryer 1998, p.8). Culture appears in many contexts—from street gangs to buried civilisations—and each can be examined by scholars through a plethora of lenses (the culture of kinship, of governance, of learning). Many cultural 'lenses' are applicable to a study of the development of skill and knowledge in enterprises. One could, for example, examine the culture of leadership, of management, of change, of communication, of communities of practice, of distributed cognition, and more.

The culture of workplaces and how those cultures influence learning in the enterprise has been the subject of both practical and theoretical study (Billett 2001; Sefton, Waterhouse & Cooney, 1995; Maglen, Hopkins & Burke 2001; Karakowsky & McBey 1999; Cornford & Beven 1999). Most of these studies have been directly concerned with the teaching/training/learning process: how effectively and perceptively the people responsible for employees' learning (usually professional trainers and educators) undertake their role. The workplace environment is a factor which can help or hinder that learning, for example, by the extent to which people are psychologically 'present' at work (attentive, focussed, connected and integrated in their role performance).

Our research was not directed at the specifics of using the workplace as a site for teaching, training and learning. While we were necessarily interested in what people had learned and the general approaches which had been taken to generate that learning, our focus was on the broad ways an enterprise's culture shaped its overall attitude to, interest in, and use of training and learning. Three dimensions of organisational culture are central to this:

- culture is deeply embedded, even hidden:
  - Argyris and Schön (1978) first called attention to the difference between the espoused values people in an organisation hold—what they will *say* to explain what they are doing—and the much deeper assumptions which actually determine what they *do*, which Argyris and Schön labelled theories-in-use. Later work by Schein (1992) focussed on ways organisational leaders and other interested observers can dig down into the 'mysteries' of an enterprise—to the theories *in use*—to understand its culture and to set about the difficult, but not impossible, task of changing it.
- culture is fundamentally about interpersonal relationships:
  - The culture of an organisation determines (and is determined by) the ways people at work relate to one another and their attitude to their employer. These relationships can be observed in the way people help or fail to help one another, whether they respect one another, whether they 'network' and how inclusive those networks are, whether they share their knowledge and skill, and whether they are willing to take risks. It is through these interactions that culture creates the social capital of the enterprise—one might say that the social capital of an enterprise lies in its culture of personal relationships.
- culture can be changed:
  - It is often pointed out in the management literature that one of the responsibilities of senior management is to shape an enterprise's culture. Managers can certainly try to change the culture and work dynamic of their enterprises. They sometimes succeed. Where there is a contradiction, however, between management's story about the culture of the enterprise and the stories people tell one another when the boss isn't listening, it is the workers' stories that count. Culture is what everyone *feels*—not what management declaims. It is also the case that the leading influences on culture can originate from any place in the enterprise

Undertaking this study of enterprise culture

Understanding the approaches to training and learning taken by ten small to medium-large (three to 1000 employees) enterprises was primarily to be achieved by case studies. Stage One of the research began with a search for ten enterprises which had developed, or were developing, a culture that promotes training and learning. We left the definition of such a culture very loose—saying to the enterprises we contacted that we were *not* looking for perfection, only for companies that seemed to be able to turn ordinary training and learning into something 'a bit special' for the individuals involved and for the enterprise.

One of the initial complications in considering the cultures of the enterprises we were to study was whether we were searching for *training* cultures or *learning* cultures. At the time the research was started the difference between the two terms was a matter of considerable debate. The vocational education and training sector in Australia had become quite focussed on the word training: the national body of oversight for the sector, for example, is ANTA, the Australian National *Training* Authority; *Training* Packages detail the competency standards to be achieved through VET; there had been a *Training* Guarantee levy. On the other hand, the idea of a *learning* organisation, first popularised by Senge (1990) and further developed by his group (Senge et al. 1994; 1999) had been picked up across the management literature and had become something of a mantra—the goal any sensible enterprise would aspire to.

Our Stage One cases were designed to explore what the enterprises, and individuals at all levels in them, were doing with respect to training and learning and, most importantly, why they were doing it. We were as interested in their thinking as in their doing, and in the culture of the enterprise that quietly shaped their thinking. To investigate these issues adequately, we paid a great deal of attention to two aspects of case study methodology:

- finding diverse sites:
  - In identifying the enterprises to use in both stages of the project, we were determined to contact a wide range of individuals and agencies who might suggest possible candidates. Thus our sources across the country included not only industry training advisory bodies (ITABs), registered training organisations (RTOs), and government authorities *inside* the VET sector but regional development authorities, business enterprise centres, the Australian Institute of Management and other consultants from *outside* the sector. The richness of the resulting samples in terms of their variety and freshness has been a distinguishing feature of the study and one which the Stage Two enterprises consistently said fuelled their interest in the material;
- asking diverse questions:
  - Site visits to most of the Stage One enterprises and to a number of the Stage Two enterprises were conducted by two-person teams. The logic being that the provision of two perspectives was likely to result in following different 'trails' during our questioning and then forcing a more thorough examination of our individual interpretations of what we were seeing and hearing. The value of the approach far outweighed its cost. Interestingly, interviewees did not find it intimidating to be interviewed by two people.

These two tactics proved extremely important and contributed substantially to the final quality of this study. We recommend they be adopted more widely.

Using case studies to 'market' training and learning to enterprises—the second purpose

The case studies were intended not only to provide insight into the cultures of training and learning in the ten Stage One enterprises, but to serve as the source of material to give to a second sample of enterprises (the Stage Two enterprises) to see what, if anything, they found in the material that convinced them to rethink their approaches to training and learning. The case studies were, thus, a vehicle for better understanding how to market the value of training and learning.

Marketing campaigns are typically based around a matrix consisting of three principal elements:

1 the target audience(s): the whole of the intended population segmented according to one or two key characteristics

2 the message(s) to be directed to each segment (and why)

3 the channel or modes of communication which would most effectively reach each audience segment and through which the message would be best grasped

The most systematic and comprehensive marketing survey about training in Australia is the National Marketing Strategy for Skills and Lifelong Learning in Australia (Quay Connection et al. 2000a; ANTA 2000)—which is generally referred to as the ANTA marketing strategy. The study primarily focussed on the way individuals think about learning and training and found that most people like learning—are keen to learn—but have quite negative feelings about formal study. One component of the study did survey enterprises by telephone interviews to gain their views about training and learning. The survey identified three employer segments and the marketing team has devised strategies for each:

- 'high achievers' (44% of the sample): who value all forms of training (on- and off-the-job, including non-work employee learning). The marketing goal for this segment is to 'increase these enterprises' investment in VET and enlist their support' through such strategies as:
  - improve VET delivery systems and customer satisfaction
  - increase the tangible benefits that employers can derive from their training
  - reinforce employer support for all forms of learning by making the tangible and intangible benefits more explicit

- here and now' (37%): who value training but prefer on-the-job training and do not value non-work employee learning. The marketing goal for this segment is to 'get them in—keep them in' through such strategies as:
  - improve the delivery system and remove barriers
  - reinforce realistic expectations and why there is an urgency to invest in training
  - utilise credible influences and support mechanisms
- 'not interested' (19%): who see problems associated with training (including the cost) and are least likely to offer formal training to their employees in the next 12 months: The goal for this segment is to find a new way forward. The suggested strategies include:
  - improve the ability of employers to act and address barriers
  - increase awareness about the central role of skills and learning in small business success
  - increase awareness of the benefits of training on the profitability and on-going viability of small business

The ten Stage One enterprises in our research all valued learning but it is not obvious that they would have been rated as a 'high achiever' in terms of ANTA's criterion as their use of the formal integrated VET sector varied. They all invested significantly in informal learning. Some also bought formal training, not all of which would be recognised in the Australian Qualifications Framework. Our purpose in using the Stage One enterprises as a base for marketing, however, was not to rate the enterprises in terms of commitment to training and learning, formal or informal, but to extract from them material about their training and learning which might prove stimulating and useful to other enterprises.

One might look on our approach to understanding how best to market the idea that enterprises might rethink their approach to training and learning as complementary to the ANTA marketing strategy. Rather than using a set of questions about the respondents' direct experience, we focussed the discussion on the experience of other enterprises (the case studies) and we asked them to make detailed judgements about the material presented. As a consequence our data is rich but acquired from a relatively small sample of 19 Stage Two enterprises. The ANTA survey contacted more than ten times that number of enterprises (252 employers surveyed) but, necessarily, provided them with a more limited range of stimuli.

Undertaking this study of 'marketing' training and learning

The detailed Stage One enterprise case studies were used as the basis for developing two 'products' which we thought might prove stimulating and useful to the Stage Two enterprises. The two products were:

1 a suite of themes and issues—twelve in all—which drew out the *business* perspective on training and learning. The issues included whether training is a cost or an investment; staff morale, staff retention; what about the people who don't want more training? A few pieces explored the kind of learning that seemed most productive and this led to a consideration of the role of informal learning in enterprises and the way enterprise culture operates to enhance or inhibit applicable learning and innovation.

2 'case stories'. The full case studies were rewritten into shorter versions (5–6 pages) which focussed on those aspects of the enterprises' experience which we thought were the most insightful and important.

Both the themes/issues product and the case stories were then compiled into a professionally designed spiral bound booklet of some 130 pages titled *Building on other people's experience*.

The twenty-one enterprises selected for Stage Two were not chosen to directly match the Stage One enterprises but were selected to be as diverse as a small sample could be in terms of industry, past training/learning, location and size. They were asked to look at the booklet *Building on other people's experience* and give us feedback about what they found most helpful and interesting, whether anything in it led them to think differently about their own enterprise's training and learning, what other information they might have wanted, and any improvements or ideas they could suggest. The richness of the data far exceeded our expectations.

Structure of the report

The remainder of this report is structured in four chapters to reflect the two stages and the two purposes of the study:

- Stage One: Methodology and findings; producing Building on other people's experience
- Stage Two: Methodology and findings
- Conclusions (1): Concepts of cultures
- Conclusions (2): What is convincing to enterprises?

The relevant literature is reviewed and discussed in the context of the findings in the two Conclusions chapters.

The research team

A large research team was brought together for this study because we were convinced that we needed different perspectives both in interviewing during Stages One and Two and in analysing the rich and extensive data collected. While not all members of the team engaged in writing the case study material or the final report—and for that reason do not appear as authors—all contributed significantly to the project.

We were right in thinking that we needed to bring to bear the views, knowledge and insight, of a range of people. The background of the research team included those who work as trainers, those experienced in organisational development and business strategy, those who advise industry, and those who develop policy in the VET sector. All were experienced interviewers. The many meetings the team held during the course of the project were lively, especially on the occasions when people either didn't understand or actually misunderstood one another. If a large and diverse team is not always an efficient or inexpensive way to conduct a research project, the quality of the work—the way ideas and plans are tested and probed at all junctures—attests to its overall effectiveness.

The members of the consortium:

Anna Alderson – a director of AAAJ Consulting Group (which was established in 1998) with special expertise in developing training programs. Prior to working as a consultant she was director of Meerilinga Young Children's Foundation. She is also an experienced university lecturer and researcher—including research undertaken about policies and politics in the VET sector.

Anna Blackwell – executive officer of the Building and Construction Industry Training Council (WA) which is, in national parlance, an ITAB (an industry training advisory body). Anna brought to the group a detailed knowledge of skill development in the trades and construction area. She is also an experienced teacher with a background in competency-based education.

Anne Butorac – a director of AAAJ Consulting Group with special expertise in mentoring and on working with people from diverse backgrounds. Prior to working as a consultant Anne was manager of the Social Justice Branch in the Education Department WA.

Jane Figgis – project manager of this study; a director of AAAJ Consulting Group with expertise in communication and on the impact of research. Prior to the establishment of AAAJ she was a broadcaster with ABC Radio National producing and presenting such national programs as Science Bookshop and the Education Report.

Keith Mitchell – organisation development manager, Sealcorp Holdings Limited. At the start of this project, and for most of the duration, Keith was organisational development manager at Burswood International Resort Casino. He has a long-standing interest in training—he led Burswood to be accredited in the international *Investors in People Program* and he was a member of the 1998 national task force investigating the development of a training culture in Australia.

Lyn Sherwood – managing director on the Construction Skills Training Centre (WA). Lyn has had a distinguished career in education—initially as a schoolteacher and eventually a district superintendent in the Education Department, WA. From 1992–2000 she was the chief executive officer of the Building and Construction Industry Training Council (WA) where she oversaw the development of innovative training programs and approaches to funding training.

Moira Watson – manager of QRD Consulting which is a branch of West Coast College of TAFE in Western Australia. Moira has been responsible for a variety of projects involving the development of complex training programs for public and private sector enterprises.

Ann Zubrick – a director of AAAJ Consulting Group. Ann is a developmental psychologist and was Foundation Professor and head of the Department of Speech and Hearing Sciences at Hong Kong University. She serves on a number of government committees and has reviewed and evaluated education programs in Australia and internationally. She is an expert facilitator.

Stage One

The first stage of the project was to carry out case studies of ten small to medium-large sized enterprises. Case studies are used for many purposes (Yin 1989, p.13 ff). Our Stage One cases were designed to explore what the enterprises, and individuals at all levels in them, were doing with respect to training and learning and, most importantly, why they were doing it. We anticipated that during our time on site we would be engaged in wide-ranging discussions and observation—as indeed, it proved. However, our intent, was ultimately—and quite openly—to obtain only two kinds of information:

1. indicators of a training or learning culture at the site
2. experiences which, when recounted well, might help convince other enterprises to rethink their approach to training/learning

This chapter describes the way the original cases were selected, the site studies carried out and the findings analysed. The development of the booklet *Building on other people's experience* is explained in some detail as it constitutes the material which went to the Stage Two enterprises. A discussion of the findings on enterprise culture appears in the chapter Conclusions (1) where the data from both Stages One and Two enterprises can be jointly considered.

Methodology

Selection of Stage One enterprises

While sample selection in quantitative research has been rigorously developed and tested over the years, the selection of cases in qualitative case study research is not always subjected to the same scrutiny and analysis. We decided at the outset that choosing the *sources* that might suggest case enterprises was a critical step in the selection process. If the source is narrow, or confined to one group of stakeholders in vocational education and training, then the final sample will inevitably be narrow. For that reason we approached the task of identifying Stage One case studies by approaching a wide range of potential leads. These included contact (mostly directly by telephone) with:

- practice firm co-ordinators in Technical and Further Education colleges (TAFEs) throughout all States and Territories
- 10 national industry training advisory bodies (ITABs)
- a few private registered training organisations (RTOs) and the Association of Private Training Providers
- the individuals in each State and Territory and at the Australian National Training Authority (ANTA) who manage the Annual Training Awards
- State training authorities
- the Australian Institute of Management
- business enterprise centres
- regional development networks
- people working on the national Marketing Strategy for Skills and Lifelong Learning
- various management consultants whom we know do excellent work helping client organisations to improve their human resources function

Further, enterprises which had been used in previous case studies were considered (particularly in the series of research reports by A Smith, P Roberts, C Noble, G Hayton, J McIntyre, and R McDonald done 1994–1996 for ANTA and the Victorian Office of Training and Further Education, OTFE).

Altogether some 170 enterprises were collected in this net. It was easy to eliminate many of them because no matter how insistent we were that we wanted local colour and direct relevance to small/medium-large sized companies (or sites), many of the suggestions were of large multinational companies whose 'loose change' for training programs far exceeds the annual turnover of smaller enterprises. We also wanted examples that were fresh, even surprising. We whittled the list down to 35 enterprises which all appeared to be credible case studies.

The next step was to create a matrix to prioritise the 35 'candidates'. The attributes on which selection was based were:

- training/learning initiatives
- size
- networks/supports
- industry sector
- regional or metro location

The attributes of the ten enterprises finally selected are set out in table 1.

Table 1: Stage One enterprises

Enterprise	Source	Size	Training/learning focus	Location	Industry sector
Harvey Beef	ANTA website: a 'good news' Training Package story	510	has changed its approach to training	Harvey, WA	Meat processing
Harvey Newsagency	business enterprise centre	4	owner is a good networker and a 'seminar junkie'	Harvey, WA	Newsagent
O'Reilly's Rainforest Guesthouse	ITAB	50	emphasis on multi-skilling; business expanding into new markets	Lamington National Park, Queensland	Hospitality
Pretzel Logic	AIM	50	coping with acute skill shortage in the industry	Perth, WA	ICT
St John of God Hospital	local reputation		diversity of training linked to sense of mission	Perth, WA	Health
Salty Seas	ITAB		developed from a training program for unemployed youth	St Helens, Tas	Fishing
Simplot Kelso	Community College (TAFE)	180	designed own training program	Bathurst, NSW	Food processing
South Sydney City Council	TAFE; training award winner	1000	diversity of training; interested in improving internal culture	Sydney, NSW	Local government
Stelform Engineering	regional industry network	100	introduced 'soft skills' training to managers	Bennetts Green, NSW	Metal fabrication
University of Wollongong Library	Investors in People	64	accredited by Investors in People; detailed staff development plans	Wollongong, NSW	Library

It may be worth noting that only two of the enterprises we approached to be a Stage One case study declined to participate.

Conduct of Stage One case studies

Case studies of this nature impose two conflicting demands on researchers. On the one hand, on site the researchers need to be open and willing to follow where conversations with interviewees lead. On the other hand, there needs to be enough rigour and discipline in collecting data that it is capable of being contested or validated by others. The consortium put together for this project resolved the tension by thinking through in advance how to be both responsive and rigorous.

Responsiveness

The ethnographic literature recognises that 'culture' is a complex concept—not least because cultures are dynamic and change over time, sometimes quite rapidly. For purposes of analysis, however, it is generally agreed that culture can be thought of as having two components. First, a material/behavioural component—what training/learning is done, in our case—which is straightforward (if not easy) to capture. Second, there is a 'mental' component—how people think and feel about training/learning in their enterprise and outside it—which is much more difficult to uncover. Ethnographers insist that the latter requires a very open approach. By asking what one ethnographer refers to as the 'grand tour questions' (Spradley & McCurdy 1972) informants are given an opportunity to open up their world and what is of particular significance to them.

The relatively new strategy of Appreciative Inquiry takes a similar approach. Its advice is to:

> *Suspend one's own assumptions and not be content with superficial explanations… question the obvious and do this in more of a conversational, self-disclosing way than is normally taught in interviewing courses.* (Bushe 1995)

We adopted many of the principles of Appreciative Inquiry in our interviews and group discussions. We took considerable care to think through the way we would handle these conversations, especially because we were to talk to people in very different jobs, with different experience, different seniority and with different ways of speaking and listening. We believe it is worth identifying some of the 'hints' for interviewing well that we developed for these case studies:

- Make-it-strange: in certain circumstances a good opener is: 'Imagine I am a visitor from Mars and I hear people talking about things like staff development, training, learning-on-the-job but I don't know what they mean. What could you tell me about these as they exist in your organisation to help me understand these things?'. This strategy works well where you want to help people bring some of their taken-for-granted knowledge to the surface.
- Ensure that the language used and the way questions are framed match the expectations and style of the informants.
- Useful probes include:
  - Tell me more …
  - How do you know? …
  - Why do you say that? …
  - Give me an example …
  - That's interesting. Tell me more …
- Don't talk too much—think of it as a conversation but one where the researchers do the minimum amount of talking.
- Silence is very useful. Often the informant will fill the gap and tell more. Silence can be a good thinking time for the interviewee and the interviewer.

Rigour

The many texts on ensuring that qualitative research delivers robust and reliable findings (for example, Atkinson & Delamont 1985; Delamont 1992; Lee 1999; Punch 1998; Robson 1993; Yin 1989) all advise that one must be clear ahead of time about what one is looking for and that many sources of evidence must be accessed.

One of our key strategies, and one which we would recommend to others, was the use of two-person teams on site. The reason for this, as we pointed out in the project description sent to the enterprises, was to ensure that consortium members with different perspectives and experience could listen to and observe what the individuals and enterprises were saying and doing. It is an immensely effective strategy and, while it increases the cost of case studies, the value it delivers in terms of quality and depth more than compensates for the cost. We found the following:

- Researchers debating and, therefore articulating, *during* the case study some of the questions and uncertainties they had. This meant we had an opportunity while still on site to probe and gather more evidence.
- Different researchers did notice things that their team partner had missed or assigned less weight to.
- The dynamics during the interviews and group discussions underwent interesting small shifts in tone and interaction as one researcher or the other took the lead in questioning. On occasion we could play the 'good cop – bad cop' routine.
- Conversation between the researchers during the interviews/discussions made the experience more engaging for the interviewees and helped them to think more deeply. It was clear that having two people who have a good rapport between them seems to make it easier for the interviewee—*less* intimidating than facing a single questioner.

Reflecting on why this two-person team approach was so powerful, we realised that we were effectively creating a second mode of 'triangulating' evidence. It is normal practice to 'triangulate' information coming in—to obtain it from more than one source. In a sense what the two-person teams were doing was to triangulate—multi-source—the questions *and* the style of question, questioner.

Site visits

The enterprises were visited between March and June 2000. Most of the site visits (seven of the ten) were conducted by two-person teams from the consortium.

From site studies to *Building on other people's experience*

The decision was taken early on that the material to go to the Stage Two enterprises would be of two types. One would be stories about the experiences of the Stage One enterprises; the other would be a set of 'themes and issues' that could be drawn from the original cases and which might be of interest to the Stage Two enterprises. The development of these two 'products,' the ten case stories and the twelve themes/issues, were eventually compiled as the booklet *Building on other people's experience*. They are briefly described here.

Case stories

The interviews, conversations, observations and analyses of documents all contributed to an initial write-up about each enterprise which could be called the 'full' case study. These descriptions were long. We eventually decided they were, in fact, too detailed and wordy to effectively convey the most important and interesting approaches to training and learning that the enterprises had grappled with. Consequently, the full material was rewritten into five–six pages—called 'case stories'—which focussed on the enterprise's (and individual's) most relevant experiences.

In revising the material into stories, we were mindful of the work being done in the developing area of case-based reasoning. While the area's primary focus involves computer database cases, there are some interesting precepts developing in the field (Leake 1996) which were relevant to writing our cases in ways enterprises would find useful. The precepts include:

- Cases are important because people don't usually think from first principles: mostly people think by remembering incidents, experiences—i.e. *cases*—and when a similar situation arises, the knowledge and decisions embedded in that case provide the starting point for interpreting the new situation or problem.

- The best cases teach a useful lesson.
- The best cases--the most memorable cases—are those which are different in some way from what is expected.
- One simulation program based on a case study database actually prompts the user by asking 'do you want to hear about what happened to someone who did what you just did?'.

The case stories, above all, were written to be readable—indeed, the intention was to have people in Stage Two *enjoy* reading them.

Each case story was checked for accuracy by the enterprise. A few small changes needed to be made but the enterprises were well satisfied with our portrayal of them—a few, in fact, said getting the feedback about how outsiders viewed their approaches to training and learning was not only valuable but was the reason they had agreed to take part in the project.

Themes and issues

Generating themes and issues from the case study material was a more complex process than we had anticipated. This may have been in part because the database from the case studies was so rich. Also, cultures which turned ordinary training and learning into something really effective varied so substantially from one enterprise to the next that every time we went to factor the material into separable products, it felt as if we were losing too much of what we wanted to share.

In the final analysis we used two 'filters' through which to reconfigure the case study findings. One was to think about the material from the point of view of an enterprise considering its business imperatives (productivity, maintaining worker motivation, competitiveness). The other was to think about it from the perspective of the known barriers to training (trained employees will be poached; the formal training system is so complicated; training costs too much).

It was another balancing act to write the themes and issues in a manner that did not trivialise the original findings. We wanted to keep the material tough enough that we were not patronising or insulting the enterprises in Stage Two. The themes changed as we tried to bring them to life—for different reasons. The planned: 'If I provide training should workers get more money?' was a good idea and two enterprises had something to contribute, but not enough to give it depth. One early idea was to have a special theme for enterprises where the number of employees is growing rapidly, but since anyone facing that problem is, more fundamentally, worrying about issues of internal community and communication, we decided to scrap this as a separate theme.

One important dimension that informed the development of the themes and issues was that they should incorporate principles known to facilitate learning. The literature which deals with the principles of learning is immense but it is effectively summarised and stated in the Western Australian Curriculum Council's Curriculum Framework (Curriculum Council 1998). They note that the principles of learning (and teaching) are:

- opportunity to learn
- connection and challenge
- action and reflection
- motivation and purpose
- independence and collaboration
- inclusivity and difference
- supportive environment

Questions were inserted into the themes and issues in an effort to make the material an effective learning tool. The intention was to prompt readers to think about how the ideas related to their own enterprise and circumstances.

The 'package': *Building on other people's experience*

Originally we had considered using video material as well as written material, putting the cases and themes/issues onto a CD-ROM or web site and incorporating more visual description—for example, specially commissioned cartoons. Time and cost made those ideas unrealistic. Any future developments based on this project should seriously explore those modes for communication.

We did use a professional typographic company to design the booklet. It was their wise suggestion that tab dividers should be used to separate (and title) each theme. The divider pages prevented the booklet from appearing to consist of overwhelmingly dense text. Placing the spiral binding *inside* the two-colour cover gave the finished product a bit of panache and made it clear that this was not an amateur effort, but one on which care and thought had been expended.

Stage Two

Methodology

This part of the project was designed to better understand what convinces small to medium-large sized enterprises to think differently about the learning and training they do and, to understand what inspires them to extend or enhance their engagement with learning and training. As explained in the introduction, the project was carried out in two stages:

- In the first stage, ten enterprises which had developed or were specifically developing a culture where training and learning 'work' were studied. The cases were examined to draw out the themes and issues about learning and training which these enterprises had grappled with. The cases studies themselves were written in a manner that might engage other enterprises, not as complete academic analyses. This material was compiled into the booklet *Building on other people's experience.*
- In the second stage, 21 enterprises were invited to look at the booklet and asked to provide feedback on whether the themes, issues and stories were interesting, helpful or convincing to them.

The role of the Stage Two enterprises was explained in *Building on other people's experience.* Readers were asked to go through the booklet and think about what grabbed their attention, what was interesting, what was helpful, what might be useful to them or someone else, what might be improved, etc. They were told that we did not expect them necessarily to read all the material. Even if they were to select and read only two or three items in detail, that would still be very useful to us.

We inserted copies of a simple one-page 'questionnaire' in which the reader was invited to consider:

- What about this particular item captured your interest?
- What more would you like to know about this issue (or enterprise)—either from us or from the people we visited?
- Are there other materials about training, learning, work, organisations related to this issue or story that have been useful to you? What are they?
- Tell us about aspect(s) of this topic you could use specifically in your enterprise.
- Would you need to make modifications in the way you apply the idea(s) ... what are they? ... how would they help?
- Any other thoughts?

Selection of Stage Two enterprises

Potential Stage Two enterprises were identified through a process similar to that in finding the ten Stage One cases: a deliberate effort was made to access a range of sources who would be familiar with 'interesting' enterprises—for example, ITABs, Australian Institute of Management, business enterprise centres, regional development networks, RTOs (public and private), participants in leadership workshops, consultants and professional colleagues. We were looking for enterprises which were varied in terms of industry, size and location—in this they were similar to the range of enterprises in Stage One although no attempt was made to match Stage Two enterprises to the Stage One cases.

The use of these sources meant we did not expect to find enterprises which had absolutely no interest in learning or training. What we did ask for were enterprises that might be *concerned* about their involvement with training or learning—and we left it at that, not specifying what their concern might be. As it turned out, that loose definition brought us into contact with a wonderfully rich and interesting group of enterprises. It should be said that most of the Stage One enterprises would also have described themselves as 'concerned about learning and training'.

We recognised that asking people to read this material and discuss their reactions with us was asking a considerable favour of the enterprises. We were prepared to have many refusals. In the end, only two of the enterprises we contacted declined the invitation to participate, although two companies did pull out later. The first to withdraw, a gear manufacturing company, explained that the original contact had left and the managing director felt the company was simply too busy with production to spare the time. The second, a transport firm, did not give a reason.

Interestingly, we had a few enterprises 'volunteer' to participate. One inter-sectoral regional library planning group knew of the booklet *Building on other people's experience* because a member of the group was from the City of Albany which was a Stage Two enterprise. In another case, a Commonwealth government department heard about the booklet during a panel discussion and asked for copies to use in their corporate planning. We sent copies to those groups but did not expect them to become involved in the project. However, one community service group, Mofflyn, happened to hear about the booklet (one of the consortium members is on Mofflyn's Board) and they did become a participant in Stage Two.

The interviews were conducted between 5 November 2000 and 25 January 2001. A draft of this chapter was sent to the interviewees to ensure we had correctly reported their views. Their feedback has been fully incorporated in this report.

Thumb nail sketches of Stage Two enterprises

This section lists, alphabetically, the enterprises which took part in Stage Two: their location, industry sector, size and a brief description of their engagement with training and learning. It needs to be remembered that these enterprises were not treated as case studies. The process with them simply involved interviews with a few key individuals (or a group) in the enterprise. We did not seek additional data from other sources to confirm what we were told although, of course, the interviews and group discussions involved searching and discerning questions.

ACI Glass - Adelaide, SA

The Adelaide plant specialises in the production of bottles for the wine industry
280 employees
Respondent: Des Brown, personnel development manager

Training/learning:

With the introduction of new technologies, employment at ACI Glass in Adelaide in the last decade has gone from 700 workers to 250 while production itself has increased. For the new technology and processes to work best, the workers need to be skilled technically and work differently (more co-operatively and entrepreneurially). After a year of planning and designing databases, skills audits, training modules (linked to Training Packages), a rigorous 3-year retraining program began in January 2001. Employees will, in the end, receive an 18% pay increase. The Adelaide training program is also serving as a pilot for similar future programs in other ACI plants. The budget for the pilot program is $2.7 million.

Airlight Group - Perth, WA

Primarily contract cleaning but also supplies other services for building maintenance like carpentry and security
1000 employees
Respondents: (interviewed as a group)
Jim Bond, group managing director
Ross Gavranich, group marketing director
Kathleen Gates, general manager, Administration
Mick Skeham, divisional operations manager
Emily Montgomery, human resources co-ordinator

Training/learning:

Until 18 months ago, training in the cleaning industry was minimal. There is now a Training Package in Asset Maintenance and Airlight has been investing a considerable amount in training (about half the funding is from government subsidies, about half from the company). The company hopes the training will help change the workers' prevailing attitude 'I'm just a cleaner'. Airlight's ambition is to be the market leader with the motto 'we have a trained workforce'.

Airlight is aiming to achieve a Workplace Silver rating. The initial audit, according to Jim Bond, revealed that 'we were a bit worse than we thought. The auditor suggested we tackle the problems in teams and that has turned out to be the biggest cultural change we've ever seen. We created five teams (training, management review, hazard identification, planning, communication) but the team leaders are not the traditional managers but other people, for example, the person on reception is a team leader. It has been a really good way of doing it'.

Anglicare - Adelaide, SA

Provides the full range of community services including aged care, family support, youth support in 48 programs spread across 12 locations in the State
600 staff and 600 volunteers
Respondents: (Blackwood and Battye were interviewed together, the other two separately)
Geoff Blackwood, manager HR
Margie Battye, manager, Alternative Care
Kelly Britton, assistant to manager HR
Lyndall Stuckey, co-ordinator of volunteers for Alternative Care

Training/learning:

The central issue for Anglicare is coping with the competitive tendering environment that has been introduced into the welfare/care industry. Anglicare SA has been very successful in winning large tenders but the senior managers are deeply concerned that the business atmosphere is weakening 'our sense of being Anglicare'. As Geoff Blackwood said, 'I'm sometimes afraid I am becoming more interested in the money we bring in than in the service we deliver'.

The changes which have accompanied competitive tendering, for example, the contractual nature of staff employment, have taken their toll in the last year in terms of industrial disquiet although that has been resolved. Anglicare has always provided some training for staff and volunteers but is not particularly satisfied that it is encouraging learning as well and effectively as it would like.

Ballarat Group Training - Ballarat, Victoria

A registered training organisation and group training company primarily focussed on retail, health, IT, office administration
25 employees (5 of whom are part-time)
Respondent: Peter Lane, CEO

Training/learning:

This not-for-profit company is concerned that apprenticeships and traineeships in Australia don't come up to international standards (in terms of both funding and outcomes). Lane, who received a Churchill Fellowship to observe what is happening elsewhere, believes that Australia is currently 'well behind in its thinking and approach to training'. The company participates in a number of business and training networks including the campaign to develop Ballarat as a Learning City.

Ballarat Visitor Information Centre - Ballarat, Victoria

Tourism industry—the Visitor Centre functions under the auspices of the Ballarat City Council
3 full time employees, 1 part-time employee, 4 casual staff, 38 volunteers
Respondent: Jeannette Horsley, centre manager

Training/learning:

Horsley is a committed advocate of training and workplace learning. Some of the centre's volunteers are completing a Certificate II course in tourism but Horsley says the issues involved in training volunteers differ from training general staff training. Volunteers are unlikely to enrol for and attend courses in hours which do not suit them or which contain material irrelevant to their specific needs and interests and, management is in no position to mandate compliance. Horsley is aiming to make the centre a rich learning environment, providing both formal and informal opportunities for extending the professionalism and knowledge of its paid and unpaid workers.

Boart Longyear - Adelaide, SA

Designs and manufactures drilling equipment for the mining industry
80 employees
Respondent: Wayne Herraman, employee development co-ordinator

Training/learning:

Herraman had only been at Boart Longyear seven weeks when he was interviewed (he had been contacted originally at his previous employer, National Foods). In his previous positions (including a number of years at Holden) Herraman had witnessed the beneficial changes that can happen in workplaces and for employees when consistent training and opportunities for learning, are provided *and* workers given more self-determination. At Boart Longyear he is drawing up plans for a considerable increase in training in occupational health and safety and is developing a team-based work organisation on the plant floor.

Boral Construction Materials - Perth, WA

This division of Boral consists of quarrying (mining and crushing), concrete (batch and tractor plants) and asphalt
approximately 80 full time employees and 40 sub-contractors are employed
Respondent: Bill Stubberfield, training co-ordinator

Training/learning:

A new thrust for training occurred at Boral Construction Materials about three years ago when the manager decided to introduce continuous improvement and team building and to emphasise safety. Stubberfield's position was established and a number of workers were approached to undertake Workplace Training and Assessment Certification. These workplace trainers maintain an operational role (about half-time). The training materials are developed with the full participation of workers whose contribution is noted on the final products.

Boyanup Auto and Rural - Boyanup, WA

Combined retail and workshop in a small country town
7 employees
Respondent: Jenny Reid, owner/manager

Training/learning:

This small business has not been systematic about training its employees but they have had apprentices in the workshop and individuals have been sent to short courses with demonstrably positive outcomes. The husband and wife who own and manage the business (with a third partner) have very different attitudes towards training and learning: He left school early and has little interest in formal study; she is an eager learner and sees the potential if the staff were further skilled and everyone was more 'open to learning'.

City of Albany - Albany, WA

Local government in regional WA
250 employees
Respondent: Chris Grogan, corporate planning and development officer

Training/learning:

The council has been through a few major disruptions in the last four years with the amalgamation of councils and further management restructures. But, starting in July 2000, they decided to take a comprehensive and systematic approach to address the training needs of all staff and have allocated $90 000 in the year's budget for that purpose. They recently conducted an IT skills audit of staff and are organising training to fill the gaps identified. A course in project management for 12 professional staff is underway. It is worth noting that this course is being delivered by the Australian Institute of Management, which was 'willing to customise the course to meet our specific needs where the universities we approached were not'.

Cleandustrial – Perth, WA

Contract cleaning for schools, commercial and industrial sites
150 employees
Respondent: Paula Squibb, general manager

Training/learning:

Cleandustrial is interested in its workers being fully trained and would like them to see their employment as a real career. The company has used various RTOs to provide training but believes that sometimes the RTOs misconstrue the company's intentions and assume that training subsidies are more important to companies than the quality of training. Often the training provided is not substantial enough and the trainees do not become as competent as would be expected. Because the workforce is dispersed to the various cleaning sites, it is difficult to establish a culture where workers know they are valued, which is what Squibb would like to create. One tactic they have taken to counter a *Them and Us* culture is to invite the employee of the month to attend management meetings.

Godfrey Hirst – Geelong, Victoria

Carpet manufacturing
Overall 1100 employees, about 800 at the Geelong plant (of these approximately 650 in production, the remainder in sales and administration)
Respondent: Bill Killin, training manager

Training/learning:

Godfrey Hirst is an old company with a formal hierarchical structure. The major change on the horizon is the tariff reduction regime which will impact on the whole industry in 2005. Formal training with site-produced training manuals for operating the production processes is an established aspect of the company culture. Beyond this fundamental production training, however, training has largely been reactive and often in response to new regulations and legislation. As Killin pointed out, it is easier to say 'the law says ...' than 'I say ...'. Killin would like to see learning play a more dynamic role in the company. He would like to develop a mentoring scheme and to enable workers in general to take a more pro-active role.

iinet – Perth, WA

An internet service provider (IT industry)
100 employees
Respondent: David Phillips, training manager

Training/learning:

Established seven years ago, the company has grown especially rapidly over the last two years (from 30 employees to the current 100) partly through acquisitions and partly through customer increase (the current customer base is 50 000). The training needs of the customer service agents, who are the key to success in this business, are complex as the agents have to be both technically proficient (skilled at solving hard technical problems) *and* able to relate well to customers on the telephone, not face to face. Further, this is a young person's frenetic environment where the expectation is that the agents will be on the phone taking calls all the time—that there shouldn't be any downtime. On the other hand, the company recognises that its agents need deep customer service skill.

Phillips identified one interesting training tactic for the company: that iinet trains its *customers*! The logic is that if even one-third of the customers who call in for help (about 15 000 of the 50 000 customers request help) could fix their own internet access problems, that would take a significant burden off the company.

Kalgoorlie Business Group – Kalgoorlie, WA

Through the auspices of the Business Enterprise Centre in Kalgoorlie, four local businesses were invited to receive *Building on other people's experience* and speak with us as a group.
Respondents:
Robert Northcoat – Brookman, Northcoat and Associates (financial planning and general insurance)
Michael McClure – McClure and Associates (accounting)
Yev Dudko – Computer Impact (retail and specialty computer outlet)
Bob Wellington – Goldfields Healthworks (health food shop, formerly included a restaurant)
Sally Bennison, Manager Kalgoorlie BEC

Training/learning:

These are all small businesses where people recognise the value of training but find it difficult to access good training in Kalgoorlie and are loathe to spend the considerable resources (both of time and money) required to travel to Perth or the eastern States for courses. While the local businesses do co-operate and try to support one another's learning, people seemed a little discouraged about whether it would be possible to significantly increase the amount of high quality formal and even informal training and learning available to them.

Mofflyn – Perth, WA

An agency of the Uniting Church, funded by Family and Children's Services and the Disability Services Council, it provides services for children and adults with physical and intellectual disabilities in WA
50 employees
Respondents (interviewed together)
Nova Farriss, director
Liz McNevin, policy and projects

Training/learning:

The community services sector is changing. More tightly specified outcomes have become a feature of funding agreements. This has led to a greater differentiation of staff and management as managers feel the pressures of meeting external accountability and seeking new areas in which to operate. Only recently have they all begun to discuss these issues. Farriss sees training and learning as fundamental to Mofflyn finding new ways of operating and working with one another, their clients and their funding bodies.

Mofflyn has found it more and more difficult to access the right training products. There are many factors which need to be taken into account: the cost, the down time, the needs of the clients. Their total spending on training has actually gone down in recent years as they've tried to become more strategic about what they do. They have found that external trainers too often think of their own needs and expectations rather than the client's.

Perth City Council, Compliance Service Unit – Perth, WA

The Unit comprises health, planning and building control, security and surveillance services, and parking services
90 employees
Respondent: Dennis Stevens, unit manager

Training/learning:

The Unit recognises training as an important and ongoing part of its normal operation—a recent example is its involvement in a trial project relating to a nationally certified qualification for its parking officers. It sees the competencies involved as a valuable base for future learning and development, and for performance management—as well as benefiting the individuals who gain a qualification. There are mechanisms for informal learning in place such as shadowing and providing secondments for people from other councils but Stevens, in his second year as unit manager, would like to increase both the formal and informal learning in the Unit. He is particularly interested in the role of workplace culture in training and learning.

Stellar Call Centre - Perth, WA

Part of a national business providing outsourced call centre services to a variety of industries. The Perth call centre was established to support a client in the telecommunications industry.
350 employees
Respondents: (interviewed as group)
  Lee White, business development manager
  Lee Winning, quality manager
  Daniel Davidson, quality manager
  several other staff read the material and filled in questionnaires

Training/learning:

Stellar has been operating nationally since May 1998 and currently has five call centres located across Australia. The importance of formal training is recognised and has been designed to fit each client's specific needs. The key to the business is open book management, and in addition to an effective continual process improvement plan there is a profit incentive scheme whereby staff performance is linked to the overall profitability of the company. Exit interviews are conducted when staff leave and there is altogether an atmosphere of wanting to get things to work in the best possible way. As White points out, 'we need to treat our people the way we want them to treat their customers'.

Strategic Enterprise Development (SED) - Ballarat, Victoria

A consulting firm specialising in helping the managers of small businesses, it is also a registered training organisation delivering flexible, tailored certificate courses in business practice and management
10 full time employees and contract staff as required for specific contracts
Respondent: Mark Shultz, director

Training/learning:

Learning plans are part of the organisational structure and are built into each individual's performance management, with individuals identifying what it is they need to learn. Shultz describes SED as 'an organisation that wants to learn' and one where they work on their culture 'constantly: we talk about it and try to assess how we are going in such key areas as autonomy, responsibility, modelling and the action learning loop of accountability'. The staff have many 'formal' informal sessions especially when brainstorming new projects and solving clients' problems. Rather than outsource tasks they are not experienced with, they bring in partners so that they can learn from the project. SED is closely involved in the networks and connections fostering Ballarat as a learning community.

Tuki Trout Farm - Ballarat, Victoria

The property operates in both the hospitality/tourism and agricultural industries: eight cottages for overnight accommodation, trout fishing ponds for guests, a restaurant, 2000 Tukivale sheep (once grown mainly for wool, now for their meat)
3 family members and one full time employee; a varying number of part-time and casual workers (including students)
Respondents: Robert and Jan Jones, owners

Training/learning:

Tuki Trout Farm has evolved by matching the natural resources of this rural property with opportunities in the hospitality and tourism market. The enterprise attracts young people with formal skills who want to acquire practical experience and mature workers, often without formal education, who value the opportunity of learning from this diverse, interesting business.

The Jones' (including Rob's father) have thought a great deal about training and learning. They have created an environment which fundamentally tries to affirm every worker's capacity to learn, but leaves little to chance. Rob observes the skills people have as they try out tasks. He builds on their strengths and teaches as much as possible through modelling and demonstration. He is careful to monitor the outcomes. Mr Jones (snr) believes that learning occurs because people are willing to do two things—'share and share. Unless people are willing to share their knowledge and skills and learn from mistakes, little advancement is made'.

Wanneroo City Council - Perth, WA

A newly created council serving a large outer metropolitan area
415 employees, including casuals
Respondent: Sandra Bresnehan, manager of Human Resources

Training/learning:

Wanneroo City Council was split from the very well resourced Joondalup City Council in July 1999 and has spent the 18 months since establishing its processes and building new offices. About three-quarters of the employees came from the original council which had its own particular culture where significant amounts of money were spent on formal training. Senior management wants the new council to become a Senge-type learning organisation where there is a focus on informal (but not unintentional) learning. He believes this runs counter to the way many of its 17 managers currently think. They also want the learning to be gained as economically as possible. One quarter of the staff come from the private sector and have a better understanding of and, more enthusiasm for, the council becoming a learning organisation. This means there is also work to be done in combining two cultures.

The 35 respondents noted above, from the nineteen enterprises, comprise the sample of the second stage of this study. The remainder of this chapter details their responses to the booklet.

Respondents' impressions of overall content and style

If any publication or product is to fulfil its purpose, the first requirement is that it be interesting or intriguing enough to attract (and hold) people's attention. It might appear that the booklet *Building on other people's experience* escaped this requirement because, in a sense, it had a captive audience in that the Stage Two enterprises had said, 'yes, we will look at the material'. But that 'contract' was no guarantee that they would actually respond positively to the booklet when it arrived and, indeed, not everyone did.

The overall response to the booklet was in most cases extremely positive. As the following remarks make clear, these people often described it as 'clicking' with them:

> *Nothing surprised me. The opposite, I kept thinking, yeah, I can relate to that … I've seen that …*
>
> *To a certain extent it re-connected me to things I had thought about, but it also sparked new ideas because you know there's an issue and that you have to do certain things, and it's only when someone encapsulates things that you start to think about it again.*
>
> *There were a lot of* 'Aha's' *… It's good to know we're on the way.*
>
> *I was really excited by it. It gave me enthusiasm but also a little sense of frustration because it's what we've been trying to do for some time but either we never get around to it or it fizzles out. So I was simultaneously excited and frustrated! How can we actually start?*
>
> *It has lots of gems. Little things to try and to know they are working.*
>
> *The analytical part is okay. What it's really got going for it is the range of companies. The way you had different size companies and different sectors because it's so easy to get caught up in just one sector. That mixture was very useful. And the stories were short enough.*
>
> *I kept asking: does this relate to us and where we are at? Or do we say, no, we are different? There were times I didn't connect with the case story but the actual theme was relevant.*
>
> *I'm a skeptic and the case studies are good because it shows you don't get there by magic. Those people had to make progress. The honesty of the case studies is fantastic. To be able to peer into their businesses like that.*
>
> *What leapt out at me from the stories is that the people in the enterprises believed in what they were doing.*
>
> *It was written in a light manner. I don't mean to be insulting—I mean it was easy to read. I could keep going.*

One interviewee summed up this positive response when she said, 'you pay attention when it is something you've been thinking about and feel relieved to see other people have the same problems'.

Not everyone, however, was so enthusiastic:

> *I've been too busy to do more than flick through.*
>
> *It took me weeks to go through it. A few of the case stories were okay. I read the rest but they didn't do anything for me. Some of the themes are pretty right but basically it didn't 'hit me' because I'm not so concerned about a different environment here. Also, the language isn't right for our heavy production work.*
>
> *There wasn't anything new for me to learn from it. The examples did not go far enough into formal training and learning. The enterprises didn't seem to recognise the complexities of the training agenda needed to produce enterprises competitive in a globalised environment where skilled workers have better paid and promotional opportunities outside of Australia*
>
> *I didn't read a lot of it. Would have liked to but I'm just too tired at the end of the day.*
>
> *The concept is useful and it looks like there is interesting stuff. I would like to use it but not now.*

The general layout of the booklet seemed to work well. Many people—including those who did not use it in any depth—commented about flicking through the booklet. No one had trouble seeing the various parts of it and how they fitted together.

There was an interesting 'disagreement' amongst the readers about the positioning of the case stories. Some started with them 'because they were enjoyable' and thought they should have been placed first. Others were much more taken with the themes and said they only ever dipped into the cases for details after reading a theme or issue and did not read a whole case. Some reported that they 'began at the beginning' and steadily worked through the material, and these respondents were rather taken aback that anyone would not start on page one.

The 'disagreement' is a useful reminder that individuals *are* individual in their approach to any given task. The fact that the readers who discovered they preferred the case stories had no trouble finding them and reading them first suggests that the format chosen was not a real problem. We had, in fact, put the cases second for a very specific reason: The cases were the 'raw material' from which the themes and issues had emerged. The cases had, in a sense, become the 'back up', the evidence to substantiate the material in the first part. One interviewee actually said, 'just having the case studies on their own would not have been enough. We needed you to do the analysis for us.'

We believe, although none of the interviewees remarked on it, that having the booklet designed by a professional graphic designer added to its acceptance. Taking pains with the cover and binding was a conscious attempt to show our readers this was a serious endeavour, even though the material was distributed as 'a trial' document. Only one person commented on the cover but her response was startling:

> *The cover really put me off. Every time I saw it, I thought 'no' and put the booklet away. I didn't open it for ages. The colours are so dark and moody; it's not quite focussed. It looks like a mental health brochure. It doesn't work at all.*

People liked the captions and the quotes (often quoting them back to us). A few commented specifically on how they appreciated the authors' notes and suggested activities although some concern was expressed that there was a lack of explanatory notes for some of the tools presented in the themes and issues section.

There was a wide variation in the extent to which people used the questionnaire insert. Some filled it out in detail and brought it to the interview. Others annotated the booklet itself and showed us points they had underlined and commentary they had added (for example, 'highly relevant', 'gives me hope', 'DO THIS!'). A number of the respondents had nothing written but had insightful and interesting things to say in the interview.

The issue of formal versus informal training and learning

Three of the theme topics focussed specifically on informal learning: *Learning conversations; Learning through networks*; and *The enterprise as a community of learners.* The general idea in them is that workers and managers in an enterprise will (and should) learn from one another outside formal training programs. This idea has become a staple of the management literature and sounds rather obvious, but *exactly* how one might bring this state of affairs into being—how an enterprise might create an environment which supports people in creating valuable learning experiences for themselves and others—is anything but obvious. So it was not surprising that informal learning was an issue which emerged in almost every interview. Sometimes the issue emerged in the context of the specific themes, sometimes in relation to other themes (e.g. the cost of training), sometimes it just came up when the interviewees described the way their enterprise operates or wants to operate.

The interest in informal learning was consistent but there was a difference in what people actually thought about it. Some were delighted by the concept and eager to apply informal modes of training and learning in their enterprise. Others were distinctly less exhilarated. The difference between those who really picked up on this aspect of *Building on other people's experience* and those who were more dismissive of it signals an important divergence in attitude to training and the context of training. Before detailing the difference, the meaning of informality in training and learning needs to be explored because it is a slippery idea.

Definitions

To some, informality means everything that is not formal—where formal is widely and unambiguously understood to refer to any course, short or long, credentialled or not, self-paced or time-dependent—so long as some external agent[1] has designed it and delivered it, regardless of whether the delivery is on-line, in self-paced booklets, or in classrooms. But informal has more subtle, and more instructive, meanings than simply being the opposite of top-down design and delivery of skill and knowledge.

Informality can be applied to two different features of learning and training. It can refer to the degree of specificity (formality) of the *outcomes* expected or to the degree of formality in the *guidance* the learner receives.

The formality of the *outcomes* expected from the training or learning covers a wide range:

- Some outcomes are highly specified, for example,
  - the intended outcome was that Shayne in the boning room at Harvey Beef would have a better understanding of the monetary loss incurred by the company if he and other boners delivered less than maximum yield from each carcass
  - the intended outcome at St John of God Hospital was that everyone who worked there, including volunteers, should understand and 'live' the values of the hospital
  - the intended outcome at Stelform Engineering was that managers would become better at communicating about underlying concerns so they could grapple with sensitive issues
- At other times intentional opportunities for learning are set up, but the exact outcome to be achieved is not firmly specified in advance, for example:
  - when workers 'try out' other people's positions (or indeed, when rotated during apprenticeship), it is expected they will acquire new skills and new knowledge—including the knowledge of whether it is the kind of work they want to do in the future, or not—the outcome isn't determined
  - when networks are established so that people meet regularly—for example at the Lotteries Commission dinners for newsagencies like the Harvey Newsagency, it is expected they will share insight into selling lottery tickets and/or dealing with difficult customers but, exactly what skill and knowledge they might acquire is not determined by any teacher, trainer or manager—not in the control of the Lotteries Commission, for that matter
  - when employees work on projects together across functional and hierarchical boundaries as at the University of Wollongong Library, it is expected they will learn 'something' (and so will the organisation) but no one knows what that will be in advance

Formality in learning and training—or the inverse of it, informality—can refer not only to the specificity of the learning *outcomes* expected but also to the amount and style of *guidance* given to the learner:

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[1] 'External' does not mean external to the enterprise—many enterprises design their own formal training—but external to the person doing the learning.

- It is not necessarily the case that the tighter the outcome specification, the tighter the guidance:
  - Shayne learned about yield through a formal short off-the-job course but he shared his knowledge with his workmates so that they came to know, too, what he had learned
  - embedding the mission and values at St John of God Hospital—a carefully defined outcome—is accomplished through the loose guidance of mission mentors (although the mentors themselves learn their roles through quite 'tight' guidance)
  - learning to process oysters requires an exacting training protocol and at Salty Seas in Tasmania they have formal off-the-job study leading to formal certificates. The young people there, however, learn a great deal and certainly obtain their demonstrable dynamism from the uninhibited conversation that permeates the place and the experimentation all engage in
  - coaching, learning from team-mates, observing co-workers—all loose guidance—were routinely used by many of the enterprises we studied to help workers master new skills and extend their capability
- Paradoxically, loose guidance *and* the absence of pre-determined outcomes can eventually lead to formal recognition (and remuneration) or the awarding of a national credential:
  - learning acquired wholly informally (that is, loose guidance and no set goals) but simply through an individual's experiences and their capitalising on opportunities which come their way, can expand their capability to the point that they can receive formal recognition for their new skill/knowledge through RPL (recognition of prior learning) or RCC (recognition of current competence)
  - where enterprises have performance review protocols in place, employees often have learning plans. They can, within reason, learn what they want and they can learn in whatever way they want. Some companies extend the concept of 'within reason' so far that they will pay for cooking classes and other aspects of personal development. At the performance review, however, all this is discussed and analysed formally.

There is a third, extremely important, dimension to informality in training and learning evident in the Stage One enterprises and, as it turned out, in the Stage Two enterprises too. Respondents in both stages described (real or ideal) workplaces where people did not talk or think only in terms of more-or-less structured learning objectives and more-or-less structured guidance. They described workplaces where there existed an environment or ambience, a culture, a sense of community, in which learning was 'natural' and appreciated—'part of the way we do things around here'.

This third aspect of informality arises from the well established fact that there are layers in the environment of any enterprise that shape attitudes to and opportunities for learning but that are impossible to access directly. Argyris and Schön (1974) famously called these deep ideas—ideas that invisibly mould one's response to circumstances—*theories-in-use* as distinct from espoused theories. Later Schein (1992), in studying organisational cultures and leadership, identified them as the very basic assumptions people within the organisation hold about the character of human nature, about the nature of truth, and about reality itself. A number of the enterprises in both stages of the study talked to us about trying to get the culture of their organisations 'right' to stimulate learning, particularly of attitudes[2]. Lee White from Stellar Call Centre talked about workers being 'steeped' in the environment:

> *If we treat our people how we want them to treat their customers, it becomes a learned behaviour even if it isn't a behaviour they demonstrate in a different environment.*

The appeal (or otherwise) of informality

There were many suggestions in *Building on other people's experience* about the value of informal learning and training—meaning loose guidance, under-stated learning objectives and an ambience of sharing. The nineteen Stage Two enterprises responded to this 'theme' in different ways.

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[2] It is true that every organisational culture generates learning—it always shapes the way people behave. 'Right' cultures shape productive, respectful behaviour; 'poor' ones encourage destructive habits.

Some Stage Two enterprises were interested in the ideas behind informality but were not convinced they would (or could) put in place deliberate strategies for informal learning at this time. They tended to be companies that had a history of traditional VET training. It is worth spending a moment on each of these enterprises to understand exactly what their reaction to informal learning was and why they thought as they did.

ACI Glass (Adelaide)

The company is putting in place a carefully designed 3-year broad-banded training program with all employees formally registered as trainees. The elaborate scheme includes self-administered skills audits, training modules tied to Training Packages, and pay linked to skill acquisition. In the circumstances, informal learning is not high on the agenda. However, Des Brown, personnel development manager, said he would be interested in having the Employee Development Committee (with membership from the shop floor) think about informal learning and their workplace culture using *Building on other people's experience* later in 2001, after the formal training program is fully bedded down.

Ballarat Group Training (Victoria)

Peter Lane, CEO, is not unmindful of the value of informal learning but he is much, much more concerned that people—not only his apprentices and trainees, but workers throughout Australia—receive solid, sophisticated and accredited formal training. Without that formal skill base, the informal learning, in his view, is not particularly effective. He made the point that much informal learning stems from formal learning and he thought *Building on other people's experience* conceptualised the formal and informal as being more independent of one another than, in fact, they are or should be.

Boart Longyear (Adelaide)

As a technology-based enterprise, producing drill bits for the mining industry, the company has a strong formal skill base. The first priorities of the new employee development co-ordinator has been to establish more formal training, especially in occupational health and safety and to show the company that there are valuable government incentives (subsidies) for some of the training which they should access (for example, the Frontline Management Initiative). Before he came to the company he had developed an interest in self-directed work teams where individuals learn informally from one another.

Boral Construction Materials (Perth)

Over the past three years the company has made a comprehensive commitment to formal training including building a well-equipped training centre. The change came about as a result of taking on a continuous improvement ethos which included the establishment of work teams. Bill Stubberfield, the training co-ordinator, has devised a number of mechanisms to give employees considerable control over the training they receive (including vetting training manuals and working on division-wide projects). Nonetheless, he found that the material about informal learning in *Building on other people's experience* 'didn't do that much for me because right now I'm not so concerned about creating a different environment here and the language used didn't match our language'.

Godfrey Hirst (Victoria)

The training manager, Bill Killin, would like to see more informal learning strategies introduced in the Geelong carpet-making plant—especially through project work. But this is a company that has traditionally taken a formal approach to training and Killin recognises that changing the culture is no simple matter. Further, there is more work to be done, in his view, to get the full benefit of formal training. He has noticed that even the good formal training programs they have used have not always had the intended impact because *expectations* of what people would do afterwards had not been set.

There were other Stage Two enterprises which used formal training, as in the preceding companies, but who were also keen to bring the ideas about informal learning described in *Building on other people's experience* to the attention of their enterprises. They responded positively because the informality discussed was:

- **A different way of thinking about skill development** – information about VET rarely pays much attention to informal learning:

  Informal learning is too often overlooked and needs more recognition. It was good to have all this material about it. (Mofflyn).

  I believe that people (including our managers) need to recognise there are other ways for people to learn besides putting on a training course. There is more meat in the informal approach. (Wanneroo)

  In my experience, there are often better ways of helping people—like providing a mentor—than putting on a training course. (iinet)

- **A cost conscious approach to skill development** – costs are a concern and informal learning seems economical:

  The nightmare about training is: Who pays? We haven't taken on board sufficiently that training and learning is something that happens here—internally. (Anglicare, Blackwood)

  We don't have the funds to keep putting on courses. We have to find better—yes, cheaper—ways of fostering learning (Wanneroo)

- **A flexible approach to skill development** – *many* of the enterprises have been frustrated by the rigidities of formal VET training. A number of people we spoke with said that the RTOs they had dealt with had adopted quite a limited notion of flexibility—basically small adjustments in hours and timing—which came nowhere near the customised training and close working partnerships required by the enterprise. Two examples:

  We were sometimes disappointed with the quality of the training our cleaners received. Some trainers seemed to be under the misconception that we didn't care if the training was superficial, as long as we received our subsidy. (Cleandustrial)

  Formal tourism courses do not suit our volunteers who need real flexibility of hours and it is hard to find people who will tailor the pre-packaged courses to our needs. Yet we know we could benefit from accessing that skill/knowledge base. (Ballarat Visitor Information Centre)

- **A subtle approach to change** – informal learning offered some readers a way to influence and change workplace culture without putting in place a major organisational restructure.

- **Thought-provoking** – the theme material and the case stories about informal learning were simply 'thought-provoking'—especially the topic *Learning conversations*:

  The idea of 'good' gossip is interesting—to recognise that gossip is inevitable but that it can be positive or negative in its intent and effects. (Boyanup Auto and Rural)

  The one on Learning conversations *was good. I can see that going around and talking to volunteers is an inexpensive, practical and effective way of learning from their experiences and it's not intimidating for them. And I liked the idea from O'Reilly's of encouraging accurate 'gossip' by participating in the grapevine yourself.* (Anglicare, Stuckey)

While there was a genuine excitement on the part of these respondents about the potential of informal learning in their enterprises, there was an awareness that this is no instant solution. There are 'pros' but there are also 'cons'. This is well illustrated in the discussion amongst the Airlight Group managers. What follows is a much truncated version of the conversation (lots of other topics and comments wove their way though this discussion) but it retains the basic spirit of the debate:

Skeham: *The book focussed on something we don't focus on: that there are lots of areas of training including the informal …*

Gavranich: *I was interested in that, too. But while we might not focus on it, we do do informal stuff. When I go to a site, out of habit I would run my finger down the top of a rail and then go back and say 'dust this …'. I would do that 20 or 30 times a night. Now I make it an absolute habit to raise a point with each person each time—something: good, bad, or subtle. Just so they expect that when they know I am coming.*

Bond: *The trouble with informal training is that it is going backwards to where we used to be in this industry when there was no formal training. That failed us miserably. People didn't know what they were doing.*

Gavranich: *Let's get back to this. The book has made me want to step back and look at the less structured stuff. Our problem is we don't recognise the sub-surface training that goes on.*

Bond: *True, but that misses the point. A lot of the training we need to do is being driven by our clients. Particularly for sites controlled by the government or out in mining, we are required to show that our workers have certain certified levels of training before they are allowed on site. So the training has got to be formal to prove we have a trained workforce. Otherwise we don't get the contract.*

Gates: *We've got the same requirements in quality management. You need formal proof. But after you've done that formal training, you still need to ask: What now? That is the informal and we need to keep track of it.*

Gavranich: *The area managers and cleaners actually get a lot of that informal on-going training. But you can't document all of it: if I'm out for four hours it would take four hours, or more, to document it—that's an issue.*

The need to balance the formal and informal—not only to balance them but to integrate them—was an issue that many other enterprises noticed in the material and it provoked an appreciative response:

> *These are the things you struggle with when you're trying to look at staff training and development. How do you capture on-the-job training? How do you make people realise they're learning? Those things were picked up really well in the booklet.* (City of Albany)

> *What I learned from reading the book was that I will need to start taking a more structured approach to my learning. I've simply responded to what was available instead of thinking, ahead of time, what the training needs are—the training needs of my staff and me. I need to focus on what we need.* (Kalgoorlie, McClure)

> *We do a lot of informal learning—networking and peer learning, for example. But I have also put in place, as part of a Quality Service Program, a feedback system about staff performance and service from customers which is very tight. Unless people can say exactly what they liked and experienced, it doesn't count.* (Ballarat Visitor Information Centre)

> *I have found that project work is a good way for people to start working together as a team and also in projects they can more easily recognise what they need to learn (and what they have learned). It is much harder to do that with 'normal' work.* (Godfrey Hirst)

A few people we spoke to have been involved in the highly praised *Investors in People* (IiP) program. What they were at pains to point out is that while the program encourages enterprises to help employees grow their skill and knowledge via any mechanism including the most informal, the IiP audit itself imposes a discipline—a 'backbone'—to the learning so it isn't allowed to run off in too many directions and become too loose and amorphous.

The issue of costs and benefits

Finding the funds to pay for training and learning *and* justifying the expenditure on training and learning were issues that figured prominently in the Stage Two discussions about *Building on other people's experience*. While respondents appreciated that the material at least acknowledged that costs and benefits *are* an issue, no one believed we had handled it in sufficient depth or detail:

> *The big thing that is missing is the financial information. I can see what they've done but not how they paid for it.* (Airlight Group, Bond)

> *This was my 'number one' concern.* (Anglicare, Blackwood)

> *Training is always a cost (including opportunity costs). When it is not done well it is only a cost. The art is to turn it into an investment—so the money has been well spent.* (iinet)

> *The advice 'links training and learning with the achievement of organisational objectives': I've used that principle already and it's a good reminder. But sometimes efforts are made to decide and articulate purpose and it doesn't penetrate into the organisation far enough or long enough.* (Godfrey Hirst)

Four major studies have recently been completed (Blandy et al. 2000; Doucouliagos & Sgro 2000; Maglen, Hopkins & Burke 2001; Moy & McDonald 2000) which were designed not only to calculate the return selected Australian enterprises made on their investment in training but also to develop user-friendly methodologies so that small and medium-large enterprises could assess for themselves whether changes in their approach to training are 'paying off'. While these painstaking studies, which included comprehensive reviews of the international literature, were able to identify specific returns in some enterprises, more than anything—and they all say this—what the studies reveal is exactly how complex and uncertain an endeavour a 'return on training investment' calculation is.

The complexity arises because of the difficulty in answering three basic questions:

- What counts as training in the enterprise?
- What counts as expected outcomes or benefits?
- How is 'culture'—as the factor which can enhance (or not) the value of training and learning—factored into the equation?

Question One: What counts as training?

The four Australian studies and many they cite recognise that developing the skill of employees is often best done through informal guidance and, consequently, a definition which takes into account formal instruction and work-based training but excludes unstructured on-the-job training 'under-represents and undervalues the range of enterprise training and learning activities' (Moy & McDonald 2000, p.3).

> *Informal learning and training methods, on and off the job, were regarded as many of the businesses [in the study] as generally superior to formal classroom training because* real *knowledge was learned in the former.* [emphasis in the original] (Blandy et al. 2000, p.56)

Nonetheless, many of the studies start by looking for training that is 'well-designed' (for example, Doucouliagos & Sgro 2000, p.vii) or that aligns with budget items such as the cost of up-dating learning materials, employing trainers or consultants, course fees, travel support and back-filling for people attending training (Maglen, Hopkins & Burke, 2001, p.68). Even Moy and McDonald, who so unambiguously argue for a broad definition of training at the start of their paper, come at the end to talk about estimating the training investment 'at the program design stage … [and that] information should be collected at appropriate times such as before training, immediately after training, after three and six months' (p.18). None of this accommodates, or even acknowledges, the ongoing informal processes (informal guidance, fuzzy objectives) that were so central to the Stage One enterprises.

Question Two: What counts as benefits?

Productivity is often *assumed* to be the benefit delivered by a more skilled and knowledgeable workforce. The four recent Australian studies (Blandy et al. 2000; Doucouliagos & Sgro 2000; Maglen, Hopkins & Burke 2001; Moy & McDonald 2000) made some interesting observations about productivity:

- for large companies making and selling defined products, productivity is a meaningful and measurable outcome—and a high priority
- for enterprises providing services, productivity is a nebulous and fairly irrelevant concept
- for small and medium-large companies, whether they deliver goods or services, the effort to catalogue (and measure) direct financial benefits hardly makes sense

The general consensus was that outcomes other than productivity need to be explored. One approach is to look for the specific outcomes the training was designed to 'fix'—for example, fuel usage, draft and buff forces after a Train Dynamics Concept Development Course. Moy and McDonald (2000) proposed a list—a taxonomy—of 50 commonly desired outcomes of training including rework rates, customer loyalty, absenteeism, improved response to crises, etc. Enterprises would select the particular outcomes of interest and relevance to them.

Question Three: How can we factor in the elements that boost the value of training and learning?

One of the points consistently noted in research which attempts to calculate the financial return from particular training programs is that where a significant return is obtained other factors seem always to have played a role. The other factors cited include the enterprise's human resource policies and management, work climate, the enterprise dynamic, people working 'harmoniously' with their peers, and similar. Further, rarely is a single training program in operation. Rather, an enterprise which seems to capture value from one training program is usually engaged in a number of other approaches to skill and knowledge development. Billet and Cooper (1997) in a review of the return on investment literature cite a number of examples of these so-called 'complicating' features, for example:

> *[One study] examined driver training effectiveness in terms of reduced vehicle operating costs. While financial benefits could be attributed to the training program the authors realised (like others) that other factors were contributing to the effectiveness of the program.* (p.19)

Given the documented difficulties in calculating returns on investment in training, it is no wonder that the Stage Two enterprises we spoke with were concerned—perhaps frustrated would be the better word—about their own inability to assess the 'pay-off' from training/learning initiatives. It also explains why they wanted the themes and case stories in *Building on other people's experience* to provide some direction about how they could assess the returns they might expect. And it explains why the material we provided did not fully meet their needs.

On reflection, there may have been more material in the Stage One case stories than we applied to the theme entry *Cost or investment?* Data collected during stage one does allow us to answer, to some extent at least, the three questions:

- **What to count as training?** The answer from our evidence is that *all* the training and learning that goes on in the enterprise and for individuals even outside the enterprise must be counted. Think, for example, of the work value an employee at Stelform ascribed to a parenting program he attended.
- **What to count as outcomes?** The Stage One enterprises conform to Billet and Cooper's (1997, p.14) observation that very few enterprises actually try to calculate a dollar return on their investment in training—rather, it is government, and government-funded researchers, who focus on the mathematics.

  The Stage One case studies were mindful of the resources (money and time) they put into skill and knowledge development. Yet even when the expense was a discernible budget item (for example, performance management reviews or aligning work instructions with Training Packages), the enterprises justified the cost in qualitative rather than quantitative terms. They explained their *reasons* for doing what they were doing and decided whether their expectations had been met by *observing* how people worked. They all knew in qualitative terms what they wanted to achieve and, most significantly, all of them were able to recognise when a training program or a tactic for skill development or innovation was *not* delivering what they expected. None of them thought of training simply in terms of the finances of productivity and profitability.

  The idea of a checklist of the potential outcomes which enterprises might be on the alert for holds promise. The Stage One case stories contain many good examples, although we may not have made these explicit in the theme *Cost or investment?* Interestingly, the Stage Two enterprises had little trouble coming up with ideas of their own. The conversation at the Airlight Group is a good example:

  > *It is very hard for us to measure the value of training …* (Bond)
  >
  > *Well, if we had a really well-trained workforce, a manager could manage more sites—so that would be a pay-off …* (Gavranich)
  >
  > *and training should reduce injuries and workers comp. We'd notice that immediately on the bottom line …* (Bond)
  >
  > *If training would fix turnover, it would save us a lot …* (Skeham)

- **How to factor in enterprise culture as a determinant of the value of training?** It is interesting to us that the formal research studies on return-to-training investment all concluded that where financial returns could be calculated, factors beyond the single training initiative appeared to generate the return. The Stage One enterprises make that point very clear. Our description of the Stage One enterprises highlighted the presence of 'something'—as we called it in *Building on other people's experience*—that enhanced the value of the training and learning undertaken. This 'something' needs to be brought into any conceptualisation of return on investment in training/learning because it is so central to realising benefits from training and learning.

In sum, the theme of making training/learning an effective enterprise investment was important to the enterprises we spoke to in both stages of the study. The difficulty of turning intangible assets like worker skill, knowledge and attitude into tangible dollar returns troubled a number of the Stage Two enterprises. Perhaps they would feel somewhat reassured if they knew that experts were having as much trouble grappling with it as they were. The Stage One enterprises had a number of qualitative tactics for dealing with the problem and the booklet *Building on other people's experience* may have been of more assistance here if we had made more explicit both the key questions and ways the Stage One enterprises had devised answers.

The issue of retention and staff morale

It is worth noting that the material about retention and staff morale—both in the theme section and where it cropped up in the case stories—was very important to many of the Stage Two enterprises. And they all said pretty much the same thing:

> *I was interested in staff retention. We have worked hard on that. Same with staff morale and motivation. It was good to see that other people have the same problems.* (Cleandustrial)
>
> *The shared examples were especially good—like, what if they leave?—because retention is a real problem in the country. In fact, I've been asking myself: 'Is it appropriate that we should train them?'* (Kalgoorlie, Northcoat)

One line, which appeared in the section 'Staff retention' shocked a few people. It said, 'People leave managers not companies':

> *I was horrified when I saw that. I thought: I've had people leave! This is awful!!!*
> (Anglicare, Battye)
>
> *People leave managers, they don't leave organisations. That is so simple and so true. I'd never actually verbalised it before. Why do organisations have people leaving? All organisations could benefit from focussing on giving their managers the necessary skills to ensure these possible situations are reduced. While most organisations have some sort of formal exit interview, as we do, in many cases the person leaving will not actually say, 'My manager didn't make me feel as though I was valuable and an integral part of this business'.* (Stellar, White)

People related these issues of staff retention and morale to two other theme topics: 'What about the people who don't want any more training?' and 'What if training has been tried unsuccessfully before?'. It added to their sense that the material was trustworthy and '*realistic*'. The important point is that being realistic—thinking of training issues from the business's point of view was a critical factor in winning the trust of the readers and therefore of being able to be useful to them.

Enterprise plans for using the material in the future: For building on *Building on …*

Without wanting to delineate sharp categories amongst the Stage Two enterprises, a pattern emerged in the ways they intend to move forward after considering *Building on other people's experience*. The enterprises clustered into three roughly equal-sized groups:

Cluster one:	This group found the material interesting to read and think about but it has not inspired them to change their approach to training and learning.
Cluster two:	This group picked up 'snippets' of new ideas to try.
Cluster three:	This group was stimulated enough to reflect quite deeply about what they currently do and on what they might do in the future in terms of training and learning.

The differences amongst the groups have implications for policy-makers and strategists in the VET sector who want to market training and learning to Australian enterprises. They also have implications for training providers and consultants who want to work with enterprises. Therefore, it is important to draw as much understanding of these differences from the data collected as we can. That is the purpose of this section. Each cluster is discussed in turn.

Cluster One—no immediate plans

The enterprises which did not intend to alter what they were doing after considering *Building on other people's experience* and speaking with us are all enterprises which already have established patterns of training and learning. They thought, perhaps quite rightly, that they had nothing to learn from us. Tuki Trout Farm and Ballarat Group Training, for example, have thought carefully and intelligently about the learning and training they provide and there are no grounds to think it ought to be different. A few of the other enterprises that fell into this cluster—like ACI Glass (Adelaide) and iinet—were already undergoing considerable change and the booklet appeared, at that moment, to have little to contribute to the change process already underway.

The cluster also includes a number of the manufacturing companies—Godfrey Hirst (Geelong), Boral Construction Materials (Perth), and Boart Longyear (Adelaide). These companies have very formal training regimes. The fact that they did not see much immediate mileage for them in the material forced us to ask ourselves whether there was a bias against formal training in the material. We re-examined the ten Stage One case studies. There were only two enterprises which did not actively utilise formal vocational education and training programs. One was Pretzel Logic where the dynamism of web design kept employees building their own skill and knowledge as quickly as possible but without time for formal training—indeed, their skills were often ahead of the formal training providers. The other was Harvey Newsagency which cobbled together its learning from contacts through its networks (for example, suppliers, other newsagents and the regional business enterprise centre). All the rest participated in formal training and for three of them—Salty Seas, Harvey Beef and Simplot Kelso, all food producers—formal certified training was at the very heart of their positive stories. Thus, the selection of case studies did give due recognition to the importance of formal training.

On the other hand, the majority of the themes and issues we developed for *Building on other people's experience* did focus on collaborative and informal workplace learning. This was due to the consistent importance which the Stage One enterprises attached to the informal ways people interacted. To them it was the key to shaping the training/learning culture of their organisations. It may have been that the emphasis on informality in the themes and topics section did not match the mindset of more formally structured enterprises.

Cluster Two—snippets to try

Enterprises in the second cluster picked up new ideas to try from *Building on other people's experience.* It reminded them of the importance of skill development and persuaded them that they might be able to do more or different things than they were doing. Among the examples:

- Mike McClure, principal of McClure and Associates in Kalgoorlie, announced that he was going to persevere with some training that had been organised for the afternoon of our meeting, even though he had been considering dropping it because they were so busy. He also decided he would start taking a more structured approach to his own learning.
- Sandra Bresnehan, at Wanneroo City Council, picked up on the effectiveness of case stories and thought it would be interesting to find local cases so that people working at the council could actually visit those sites to observe and, most importantly, to ask questions of the way people on that site learned.
- Paula Squibb, general manager of Cleandustrial, is interested in developing a positive organisational culture. She finds that particularly challenging since the employees all work on separate sites. She had been thinking about ways to do things better and she picked up a couple of specific ideas from the booklet which she plans to implement—for example, using projects as a way of getting people involved and creating acting positions in order to give people experience in more senior positions.
- Dennis Stevens, manager of the Compliance Service Unit at Perth City Council, was particularly interested in the potential of outside coaches or mentors.
- Chris Grogan, City of Albany, has handed a copy of the booklet on to a regional planning committee because she thought it would help them in their deliberations.

These individuals saw some good suggestions in the material and started thinking seriously about how they might apply them in their organisations. They were also attracted to the idea that it is the whole culture in an enterprise which ultimately amplifies the value of the more specific 'items' of training and learning. Changing a culture, however, requires wide collegial understanding and support. It was not clear in our conversations with enterprises in this cluster whether they had acquired the resolution or were in a position to garner that support.

Cluster Three—serious re-thinking

The enterprises in the third cluster were sufficiently stimulated by the material that they began to reflect quite deeply about where they were and where they might want to be in terms of training, learning and cultural environment. The material, in the words of one, provoked 'big thoughts'. Outwardly these enterprises have almost nothing in common:

- they come from a range of industries: cleaning, community service, tourism, communications, machinery retail and repair
- they vary in size from 1000 employees to a handful
- they come from three different States
- two are in regional areas, the others metropolitan
- the business climates in which they operate have undergone different degrees of change: for some it has changed significantly (e.g. the community service organisations); for others it is changing but less dramatically (e.g. cleaning); and for others the business environment has changed relatively little for them (e.g. the retail and tourism enterprises)

What the companies have in common is a preparedness to grapple with big thoughts. In every case it was a senior figure in the organisation who was involved and took the lead by saying, in effect: it is okay to question basic assumptions about how our culture works, how we relate to one another, how we learn and develop the skills required. Most of these managers had distributed *Building on other people's experience* to a number of people in the enterprise and when we met with them to discuss it, we met as a group. Appropriately, in these discussions the participants were as likely to be talking to one another as addressing the researcher.

It might be noted that—although no business environment is assured these days—the enterprises in this cluster are doing well and have confidence to build on. They are not interested in rethinking their approach to training and learning because they face overwhelming threats to their viability.

Revising *Building on other people's experience*

This section describes three findings from our discussions with the Stage Two enterprises that will need to be considered if the booklet, *Building on other people's experience*, were to be re-published for an audience beyond the Stage Two enterprises. It should be said that the Stage Two enterprises all thought that the booklet ought to have a wider readership. The three aspects that might be further developed are:

- improving the accessibility and immediate applicability of the booklet
- expanding some of the themes and issues in the booklet
- adding more types of enterprises to the booklet

Improving accessibility and immediate applicability

One concern that threaded its way through the interviews with the Stage Two enterprises was the question of how much how-to-do-it advice should have been included in the booklet. The premise of the project was that enterprises might change their thinking. They might become convinced to do something about their provision of training and learning after reading the material. We had not thought much about helping enterprises to *do* something beyond *thinking* about doing something.

During the interviews it became clear that some enterprises wanted more how-to-do-it details. They were also interested in details of how-not-to-do-it: they were curious about the mistakes people had made and their 'trials and tribulations'. But primarily they wanted specific advice about applying the positive ideas to their own situation. For example, the Compliance Service Unit of Perth City Council wanted to understand how to emulate the way St John of God Hospital had established a sense of values. Anglicare was also impressed by the achievements of the hospital and wanted more details on how they could set up a mission mentoring program. The Airlight Group was curious about the sequence of steps that enabled Harvey Beef to achieve such a thorough cultural change and how, if at all, they could mimic it. Thus, the question of the extent to which specific how-to advice should be incorporated in any revised edition needs further consideration.

Another issue concerns the fact that *Building on other people's experience* is print based and much of it rather dense print. Few managers of Stage Two enterprises gave the booklet to shop floor workers. In one case where we know the attempt was made, the booklet was back on the manager's desk ten minutes later. It is unfortunate that the medium appears to have excluded from Stage Two the diverse range of people within the enterprises who contributed so powerfully to Stage One.

The research team had toyed with the idea of collecting audiovisual material. A professionally recorded and edited video would have vastly increased the cost of the project. We have no doubt that had we been able to go into Stage Two enterprises with an assortment of audio visual presentations or smaller more visual pamphlets on the case stories and themes, it would have opened the discussion to a much wider sample of people, many of whom are making significant training and learning decisions for themselves, their colleagues and their enterprise.

Expanding the themes and issues

In addition to wanting a fuller treatment of 'Training as a cost or investment?', a number of the Stage Two enterprises raised three other issues they would like to have seen specifically addressed or treated in greater detail:

- What constitutes appropriate reward and recognition for employees' learning?
- The role of the Internet in learning
- Succession planning

This section briefly explains what more was requested, and why.

Reward and recognition for employee learning

The question of whether or not to offer promotional or other remuneration rewards to staff for their new skills and learning—and how you decide—was mentioned by many of the Stage Two enterprises as an issue they were grappling with or worried about. The issue was alluded to by a number of the Stage One enterprises. Simplot, Harvey Beef, Stelform and the University of Wollongong Library all mentioned that pay and promotion entered into their thinking about training and learning opportunities; however, little detail was provided as to how they actually reached the decisions they did. The concerns of the Stage Two enterprises were straightforward and consistent:

> *It would be useful for me to know how you manage a reward system. Do you have to recognise formally the training that people have done? And what about informal learning? I'd also like to know when it is wise to use a direct reward and the circumstances when it isn't.* (City of Albany)
>
> *I would like to know much more about the way people are rewarded (or not) after they've completed training.* (Kalgoorlie, McClure)
>
> *There is no recompense here for job filling—so, for example, a social worker would take a cut in pay to do a management job. Also, when we talk about job swaps we are concerned about meeting the accountability regime and back away. We need to know more what other people are doing in straitened financial times.* (Anglicare, Battye)
>
> *We link staff performance to the overall profitability of the organisation as an incentive. Staff know the cost of operating the call centre and they know how the costs relate to their own performance. It is then the responsibility of management to train and give the people the tools to take ownership of their performance and their personal impact on the business.* (Stellar, White)

Several respondents took special note of the 'notes from the researchers' in *Morale and motivation* which stated:

> *One mistake that has been made by enterprises tended to be where people had been promised results and rewards that were not, or could not, be delivered.*

The respondents, while recognising it is wise not to promise too much, still wondered exactly what incentives could or should be offered. Any revision of *Building on other people's experience* would benefit from elaborating the specific ways enterprises have resolved this question.

Internet learning

Two of the respondents to *Building on other people's experience* pointed out that the Internet as a source of learning and training is being increasingly accessed and, therefore, it would have been valuable to include more on its strengths and weaknesses. The suggestion is intriguing because there were a number of the Stage One enterprises which were using the Internet to a significant extent—Stelform Engineering, the University of Wollongong Library, O'Reilly's for advertising—but, with the exception of the web-design company Pretzel Logic, few of them actually mentioned the Internet in talking about their experience of training and learning. This suggests the Internet is not yet being used by the enterprises as a significant learning/training tool. In any revision of *Building on other people's experience*, however, it would be useful to specifically address the use of the Internet.

Succession planning

There are references throughout *Building on other people's experience* about succession planning and the value of employees' acting in diverse (and more senior) positions. The research team is not convinced that making it a fully separate topic is warranted—although a number of people suggested it was a significant point in its own right for them. It may be most appropriate to include training/learning for succession planning as an outcome to nominate in *Cost or investment?* (see p.31) because there is little doubt that systematic succession planning and career development is a benefit to business.

Additional case studies

Although the Stage Two enterprises applauded the wide range of cases, and one respondent commented that she purposely looked at the enterprises which were most *unlike* her own, people did search for parallels with their own situation. Two circumstances in particular were mentioned where readers could not match key features of their enterprises with any of the case stories:

- add an enterprise that depends on volunteers

  Two of the Stage Two enterprises we spoke with made extensive use of volunteers, but it was Jeanette Horsley, the manager of the Ballarat Visitor Information Centre who pointed out:

  > *Training volunteers is different from general staff training in some important aspects. It has to be needs specific. It is also largely not funded except where one can demonstrate the value return of formal accredited courses. Volunteers are unlikely to enrol in and attend courses run in hours which don't suit them or which contain material irrelevant to their specific work needs and interests, and management is in no position to mandate compliance. It has to be done by persuasion.*

  This is an issue which is receiving increasing attention. The year 2001 is the International Year of Volunteers and generally the significance of voluntary community work is being recognised through Compacts between governments and the volunteer sector—for example, in Canada, the United States, and England. As Australia begins to recognise how much voluntary work is actually undertaken, and governments grapple with such concepts as 'mutual obligation', which now includes the option of participation in the Voluntary Work Initiative, what training is appropriate for volunteers and how it should be delivered will become critical issues. As such, any further development of this project should seriously consider the inclusion of a specific case story with a focus on the training of volunteers.

- add an enterprise that delivers professional services

Two of the enterprises we spoke to at the Kalgoorlie Business Enterprise Centre were small businesses selling services—one in financial planning and general insurance, the other in accounting. They identified their enterprises as having significantly different cultural and learning issues from the enterprises included in *Building on other people's experience.* Their problem is in knowing which of the many training/learning opportunities on offer is going to be relevant and of good quality.

Small businesses are 'notorious' for not purchasing much formal certified training. It is easy to forget the great mass of training/learning that is directed at them by their suppliers (of computers, for example), professional and industry associations, business networks, organisations such as the Australian Institute of Management and Securities Institute Education, and government advisory agencies. The Bunbury Business Enterprise Centre, which provided so effectively for the Stage One enterprise Harvey Newsagency, was at pains to point out that they are contacted practically once a day by someone wanting to conduct a seminar or offer other training to small businesses in the region. The question of selecting the right opportunities is especially important for small professional services in regional Australia because many of the offerings are expensive to access as well as time-consuming.

Conclusions (1): Concepts of cultures

At the time this project was initiated, the idea that Australian enterprises should adopt a *training* culture was high on the formal agenda of the VET sector. The American management literature, on the other hand, originating with Senge's book (1990) was enthusiastically encouraging organisations to adopt a *learning* culture. The evidence from enterprises in both Stages One and Two of our study, and from a careful reading of other studies of Australian workplaces, is that neither adjective—training or learning—adequately describes the culture of enterprises which most effectively grow and capture the skill and knowledge of their workers.

What adjective does describe this kind of culture? We described it in *Building on other people's experience* as a culture which *amplifies* the value of training and learning. We considered any number of specific adjectives to parallel the 'training culture', 'learning culture' phrasing. At one point we settled on the term an 'integrated culture' because what we had most clearly observed was that the training and learning acquired had been integrated into people's work—not only into the work of the initial learners but into their colleagues' work as well. We are grateful to the reviewer of an early draft who pointed out that the phrase 'an integrated culture' did not advance the debate and suggested we simply use the phrase 'a culture that amplifies the value of training and learning'. We have followed that advice.

This chapter analyses more fully the meaning of 'a culture which amplifies the value of training and learning'. It does this first in terms of the enterprises we studied and then situates our thinking within the context of the research literature. There follows a more detailed discussion of the problems with the VET sector using the language of either 'training' or 'learning' cultures in advocating that Australian enterprises invest more in training and learning.

Cultures that amplify the value of training and learning

Evidence from Stages One and Two

In the booklet of material given to the Stage Two enterprises, *Building on other people's experience,* we analysed the Stage One enterprises and recognised that they shared an interesting and distinguishing feature. They had cultures where training and learning, quite literally, worked. We described this in the booklet as follows:

> *When we visited the enterprises in this study, we could see there was* something *about them which made the training and learning they engaged in deliver special value both to the employees and to the enterprise itself. Something—call it their work culture or work climate—amplifies the usefulness of the individuals' newly acquired skills and knowledge so that the overall outcome is greater than the sum of its training/learning parts. This added value is important and we have tried to understand how this kind of culture is constructed and how it operates in practice.*

It was not easy to extract the elements which build such a culture. That is partly because the ten enterprises we studied had very different cultures. One was a brand new oyster-processing group that started as a training scheme for unemployed youths; another was an established metals engineering firm manufacturing sophisticated high pressure vessels; another a guesthouse in the mountainous rainforest of a national park; and so on. They also went about the business of training and learning in very different ways. In one firm, for example, there was no formal training at all while another had a plant-wide system of nationally certified competencies; one let the employees decide for themselves if and what they want to learn while another had a specific staff development plan for each employee; and so on. A similar variety in the nature of the cultures of enterprises where training/

learning is noticeably effective has been observed in other studies (Harris & Volet 1997; Hayton et al. 1996; Johnston in press; Mulcahy 2000).

There were, nonetheless, several 'ingredients' that the Stage One enterprises had in common which seem to be at the core of workplace cultures that amplify the value of training and learning:

- People *talk* about what they have learned

  In every workplace a lot of learning inevitably goes on—as someone pointed out, even learning how to cope with boredom in very repetitive operations is a needed skill. Often, however, especially if the new skill or knowledge is picked up informally, people may not be aware they have acquired a new capability. One of the demonstrable ways our enterprises increase the value of what is learned is to ensure people actually *notice* it—and the most obvious mechanism for directing attention to new learning is by people talking about it.

  Conversations about learning, about what has been learned and how, about how things might be different or better, were part of the fabric of the enterprises studied. Conversation not only makes learning visible but in talking about it people necessarily reflect on it again. This act of reflection is itself a powerful factor in increasing the usefulness of training and learning. Several of the enterprises we studied had to work very hard and deliberately to construct a workplace where employees believed they all benefited from sharing what they had learned and could do.

- Skill, knowledge and information are *applied* to the work at hand

  That might sound ridiculously obvious but, in fact, translating newly acquired skill and knowledge into real action does not happen automatically. As one person put it, 'workers can be as skilful and knowledgeable as they want to be but only as competent in performance as the workplace allows them to be'. In other words, it is not the training and learning *by itself* which helps the enterprise, but the ways it can be put to use to meet the needs of the enterprise. In several of the enterprises people described this as finding ways to *capture* skill and knowledge.

- Many, many different forms of training and learning are used and supported

  We expected to find a reasonably wide range of methods for enhancing the skills, knowledge and attitudes of workers and managers, but the actual strategies—and combinations of strategies—successfully employed by the ten Stage One companies far exceeded our expectations.

  On the other hand, not every kind of training program works. The enterprises we studied were vigilant—and honest—about whether a particular tactic was delivering what was wanted and at the expected level of rigour. We heard numerous stories about tactics that were tried that simply didn't work and were changed—sometimes in a major way, sometimes only a few adjustments were required. Thinking about the quality and suitability of a particular approach is *not* a matter of people ticking boxes about whether they *liked* a presenter or course. It is looking systematically and rigorously at whether people are learning and using what they learned.

- Everyone in the enterprise is accorded genuine respect

  Enterprises are inherently hierarchical. They have managers and owners, supervisors, workers with different levels of skill, experience and influence. What stood out for us—what made the learning vibrant and useful—is that people within the enterprises we studied respected the ability and importance of *every* member of the organisation. Time and again we were given examples of how respecting the capacity of people to grow ensured that they did grow. As Eisner pointed out (in Wiltshire 1998) 'almost everyone in society is under-estimated not over-estimated'.

  Management in the Stage One enterprises purposefully created 'threads' of respect and honesty which they wove through the entire enterprise. When one sees this in action, and the benefits it brings to individuals and enterprise alike, it is hard to understand why some businesses allow presumptions about status and worth to prevail and thereby demean and divide their employees.

The majority of the Stage Two enterprises recognised, and liked, the attention paid to enterprise culture in *Building on other people's experience*. One respondent noted with some satisfaction that her company 'aligned' with the material. Her word, aligned, puzzled us for a time until we realised that she was referring to the consistent attention given in the booklet to the relationships amongst employees (including managers) and the principle that everyone in the organisation should be accorded respect.

The discussion with the Stage Two enterprises drew out two aspects of the significance of respectful and solid personal relationships in an enterprise. The first is that they help enterprises be *both* stable and capable of change. We are all so immersed in changing global economy that it is easy to forget how vital it is that individuals and enterprises have ballast, if not keels, to stabilise them in the shifting currents. Workplace relationships which are the bedrock of culture can play this steadying role—a point that was made particularly clear in the Stage One study of St John of God Hospital and its mission mentoring program. An enterprise culture can, on the other hand, act as an agent of change—as appears to have been the case at Simplot Kelso. The important point which Collins and Porras (1998) made that an enterprise needs to ask 'what do we *not* want to change?' as often as it considers what it does want to change was fully appreciated by the Stage Two enterprises.

The second aspect about interpersonal relationships noted by a number of Stage Two enterprises is that the relationship net can be spread more or less widely in an enterprise. Some of the Stage Two respondents were concerned that 'micro-cultures' existed in their enterprise and wondered if this was a cause for concern. On the evidence presented to us the answer appears to be both 'yes' and 'no':

- 'Yes, they are a cause for concern' is the answer if micro-cultures impose real barriers between parts of the enterprise. The barriers can be vertical as in those which isolate functional units from one another (sales from logistics, for example). The barriers can also be horizontal, preventing employees at one status level from being open with those at another. A particularly damaging example of a horizontal barrier is any arbitrary (pre-determined) differential in the funding for learning/training available to employees because of their position in the hierarchy. The comment made by a manager in one Stage One enterprise pinpoints the problem inherent in an asymmetric learning culture:

  > *It's all right me learning to communicate assertively but fairly with the floor, but the blokes on the floor need to communicate with me in the same way.*

- 'No, micro-cultures are not a cause for concern' is the answer if the diversity amongst work locations and/or functions is used not to divide people but is harnessed to extend employees' understanding of and respect for others' efforts—as Anglicare in South Australia is hoping to do. It is also the case that a micro-culture can enable individuals to function well even when the organisation as a whole is neither supportive nor entirely effective.

Evidence from selected research

There have been a number of studies of the ways in which training/learning works in small to medium-large enterprises or sites in Australia. Four groups, in particular, have been working in this field for some time and all have observed features similar to those exhibited by our enterprises in their cases where training/learning works well. Their somewhat different perspectives, however, are also important and shed further light on the nature of cultures which amplify the value of training and learning:

1. Stephen Billett has developed a model, which he calls co-participation at work, based on his studies of workplaces in industries as diverse as hairdressing and coal mining (Billett 2000). In his view, workplace learning depends on two factors: an opportunity to learn and a willingness to learn. Billett describes the former as the 'affordances' or invitational qualities of the workplace and the latter as the 'engagement' of workers. The whole model is carefully grounded in sociocultural and historical activity theory as both affordance and engagement are seen to depend on the prior experience and learning of the enterprise and of the individuals.

   Thinking about workplace learning as a balance between the two separate dimensions of affordance and engagement creates a powerful lens for examining situations of learning (or not learning). It is a fine-grained analysis which requires detailed investigation of individual learning in particular contexts. The study we undertook in Stages One and Two was not detailed nor sustained enough to produce data at that level of detail.

   The one observation we can contribute is that the distinction between affordance and engagement appears to disappear in enterprises (like Salty Seas or the University of Wollongong Library) where the level of co-operation is exceptionally high. It may be that the ideal culture is one where affordance and engagement become seamless and unproblematic to both management and workers: both engage and both afford. Where we were told stories of tension between affordance and engagement by Stage One enterprises, the workers themselves perceived that the workplace environment was not yet what they hoped for. Examples of this could be seen at Simplot Kelso when the technicians initially resented being put onto the line and at Stelform Engineering when the opportunity to be trained in soft skills was restricted to management.

2 Workplace Learning Initiatives Pty Ltd is a private training company which has carefully researched its own and others' efforts to maximise the value of workplace training in a wide variety of enterprises. They describe the kind of workplace environment which does this (Sefton, Waterhouse & Cooney 1995) as one where there is:

- a climate of participation and trust
- tolerance of divergent views
- openness to new ideas from internal and external sources
- preparedness to share information and ideas (internally and externally)
- valuing of workplace knowledge, skills and experience
- opportunity for formal and informal learning afforded to all employees

Sefton and Waterhouse (1996) conducted a survey of workers at four companies in the automotive industry and concluded that the workplaces were functioning as learning environments because employees and staff reported they had:

- the opportunity to experiment, innovate or do something different in their work
- experienced learning which changed their thinking about their work and they went on to give examples of these changes
- worked on new tasks which involved learning new knowledge and skills
- been involved in some form of job rotation (and reported this was very conducive to their learning)
- most valued and enjoyed the type of training that came from discussing their work with peers

3 Falk, Kilpatrick and colleagues at the Centre for Research and Learning in Regional Australia have studied learning in rural communities and in networks of small businesses, including networks of farmers (see, for example, Falk 1999; Falk & Kilpatrick 1999; Kilpatrick 2000). In these different settings they observe the same sorts of factors which we saw at work in enterprises where the culture amplifies the value of the learning. In the extended networks they found that what works is:

- learning that utilises what the researchers call 'identity resources'—these are primarily the participants' self-confidence and willingness to help others
- social interaction at the core of learning in the communities and networks

But social interaction in and of itself is not sufficient:

- the interaction needs to be underpinned by robust knowledge resources—knowledge pertinent to the tasks at hand which frequently comes from outside the group
- the interaction needs to take place for a purpose—it is not merely idle networking although a good deal of apparently purposeless chat may well be involved

The centre has been developing indicators of the quality of social capital used and built in these communities and is currently studying the aspects of leadership which generates quality capital. Their description of 'situated leadership' (Falk 1999) bears many similarities to the concept of 'servant leadership' which has an extensive literature (see Greenleaf Centre, 2001). Servant leaders are also concerned with quietly 'pulling together' all facets of an enterprise and ensuring all personnel are included in the net.

4 As background to their research on changes in productivity as a result of training, Maglen, Hopkins and Burke (2001) undertook an extensive review of the literature and noted that those enterprises which obtained high productivity from their investment in training usually exhibited a suite of other characteristics. The characteristics they describe are:

- work practices that empower the individual worker to exercise judgement and responsibility while working as either a highly skilled specialist or as a member of a self-managing team in a broad range of tasks
- recruitment and training practices that collectively maintain a high level of skill
- encouragement of workers to identify with their work by receiving recognition (in some form) for either high level or consistently good performance
- human resource planning that is a subset of strategic planning

- business strategy that is concerned with quality enhancement, client needs and innovation, and is informed by market and other research

> This list differs from ours in being rather more focussed on managerial prerogatives and the capacity of the 'high end' of the enterprise—for example, workers are recognised primarily 'when they perform well'. In our study the value in everyone being accorded respect and opportunities was more evident—everyone needs to be recognised not just the 'best' performers. The difference can be attributed to the different purposes of the two studies. Theirs was concerned with financial returns from training and learning; ours explicitly looked at workplace culture and the ways people related to one another. What is significant, given the difference in purpose, is the similarity in recognising the many dimensions within an enterprise that make training and learning effective—it is not the training or learning on its own.

One of the issues currently being examined in the nation-wide multi-pronged evaluation of the Frontline Management Initiative is whether the take-up of the initiative results in a change in the culture of the workplace (Barratt-Pugh 2000, 2001). The training involved in the initiative is specifically designed to help individuals in the workplace interact more effectively.

It needs to be made clear that many—perhaps most—workplaces come nowhere near to meeting the demand for trust, reciprocity and opportunity demonstrated in the research on exemplar enterprises. There are many enterprises in both the public and private sectors where employees feel insecure, refuse to share their knowledge and are unwilling to expose themselves to risk. It is important to make that point because, as others have noted, the management literature on organisational culture has a habit of slipping into the utopian realm of wishful thinking.

Using the language of 'training cultures' and 'learning cultures'

'Training culture' appears too narrow

In 1998 the Australian National Training Authority (ANTA) adopted the following definition of a training culture:

> *A training culture is a set of instinctive behaviours, beliefs and values, shared by all Australians—employers, employees, the training community and the wider community alike—which leads them to a lifelong interest in vocational education and training and a visible commitment to participating in both formal and informal training.* (ANTA 1998, p.20)

ANTA's major annual conference that year was titled *'Creating our future: A new training culture for Australia'*. Thoughtful papers by business executives, vocational education and training (VET) system leaders and Australian researchers focussed on ways an 'instinct' for a lifelong interest in vocational education and training could be developed and obstacles to that development overcome. A broad range of suggestions was offered which included: career guidance; seamless pathways; image and perception (marketing); varied delivery modalities; and specifying the financial returns possible. In his concluding overview, however, Professor Kenneth Wiltshire, special adviser to ANTA, pointed out that the main recurring issue at the conference was whether it was a *training* culture that was wanted or a *learning* culture.

Papers by the researchers at the conference (most of which are collected in Robinson & Arthy 1999) were actually quite consistent on this issue:

> *I suggest we need a radical new model for conceiving of industry and therefore of VET. The model must be one based on learning, not on training … [Workers] approach new tasks with a question in mind such as 'I wonder if I can do this?' rather than 'I wonder if I have done a sufficiently rigorous VET course which will enable me to have a go at this?'.* (Falk 1999, p.114–115)

> *Learning from experience is the most appropriate and efficient way to learn … training traditionally undervalues this.* (Gibb 1999, p.55)

> *The real challenge for VET policy groups is not to repackage structured training programs but to reconceptualise the training dominated agenda in a way that allows a more holistic view of how knowledge is acquired within real business.* (Gibb 1999, p.41 quoting Field)

Sefton and Waterhouse (1996, p.18) make the point unambiguously:

> *One of the important observations to be drawn from this project is the realisation that workplace learning and training are not synonymous. These workplaces show there is a great deal of learning going on which is not directly related to training at all.*

Research and reflection on workplace learning (see, for example, the many papers presented at the *Working Knowledge* conference, 2000) demonstrate the immense importance for the enterprise of informal (and even of unintentional) learning generated in rich work environments. Blandy et al. (2000) report that the Australian businesses they studied believe informal training and learning methods, on and off the job, is where *real* knowledge is learned. One of our Stage Two enterprises put the point most succinctly: 'informal learning', the interviewee announced, 'has more meat'.

In our study, none of the Stage One enterprises expected training programs to provide all the skill and learning the enterprise required although many—such as Harvey Beef, Salty Seas and Simplot Kelso—used formal VET training extensively and obtained excellent results from formal programs. Nonetheless, enterprises in this and other studies inevitably look beyond formal training because formal approaches are burdened by certain constraints. These constraints are:

- The cost of training

  Robinson (1999, p.7) analysed Australian Bureau of Statistics figures and found that employers who provide structured training spent an average of $185 per employee in a 3-month period—the equivalent of five hours' training (in 1996). Such a cost quickly adds up, especially if formal assessment and recording of qualifications is added to the process. The question of cost was a real concern to the Stage Two enterprises.

- The effectiveness of training

  There is evidence that although training makes a significant contribution to improving the poor performance of individuals—turning them into median level performers—it does not have much effect in helping median performers become top performers in a workplace (Fuller & Farrington 1999, p.24). Fuller and Farrington, trainers by profession, conclude that high performance in a workplace does not come about because of training.

- Training focusses on 'known' knowledge rather than generating new knowledge

  The value of training lies in its capacity to equip individuals to carry out tasks in a competent and conscientious manner—whether that is inserting diamonds in drill bits, operating a new telescopic forklift or caring for 'at risk' teenage boys at a weekend camp. The required skills may be complex and demand ingenuity but the individual is being groomed to cover a position which itself has already been defined. This is a very different situation from one where the enterprise (or a section of it) is seeking to redefine the way work is done or to 'ignite enterprise creativity', to use Buderi's phrase (1999). Training is limited to preparing people for known roles, even where those roles require—as many do—the ability to respond to unknown contingencies. The prevailing metaphor of *delivering* training itself suggests the arrival of something external and distanced from the person undertaking the training (Sefton & Waterhouse 1996, p.18).

It should be said that informal approaches to training may moderate some of these constraints and it may be tempting to label as 'training' all the informal aspects which can be used. The problem is that the word training has an accepted definition and to make it represent *everything* may not be a productive solution. As two recent studies of the return on training investment point out: when training is informally integrated with everyday work and normal production costs, it loses its distinct identity as training (Moy & McDonald 2000, p.4; Maglen, Hopkins & Burke 2001, p.68).

None of these points denies the importance of quality formal training in building a skilled workforce. The skill of individuals, however—even generic skills such as effective communication, ability to work in teams and to solve problems—is only one amongst many elements *an enterprise* must put in place for its personnel to work well and the business to operate profitably. As a consequence, it appears to outsiders a little self-serving for the VET sector to suggest that the most important thing an enterprise can do is to commit itself to more training and to creating a training culture—especially since the suggestion is often read as 'buy more product from the VET sector'.

Further, it is unclear whether an enterprise which provides more training for specified skill needs is actually changing the enterprise culture. It is interesting in this regard to note that the Stage Two enterprise, ACI Glass, indicated that one of the things it is interested in doing *after* its extensive training program (for operating a plant brimming with new technology) is well underway will be to see if the plant culture has changed in any way.

'Learning culture' appears too broad

The ideal of a learning culture is widely accepted. This is illustrated, in one way, by the immense response to Senge's *Fifth discipline* (1990) in the international management community and, in another, by the unambiguous interest in learning expressed by individual 'ordinary' Australians in the ANTA marketing survey (Quay Connection et al, 2000b).

It is also the case that many consultants and researchers, ourselves included, almost automatically make judgements about whether an enterprise has a learning culture or not—even how much of a learning culture it has. It seemed 'obvious', for example, that University of Wollongong Library has a learning culture, as does Salty Seas, and that Stelform Engineering had not quite 'got there' despite having made much progress. Sefton and Waterhouse (1996, p.14) describe the four automotive companies they studied as functioning 'to varying degrees' as learning environments. The case studies collected in Johnston (2001) describe one enterprise as having become a learning organisation 'to a significant extent' (p.62) and another as 'definitely' having a learning culture (p.56).

The problem with using the term 'a learning culture' is that in all these instances it is actually describing quite different phenomena. One of the respondents in Stage Two, David Phillips from iinet, provided an interesting analogy to make sense of the variety of 'learning cultures' one finds. A piston, he pointed out, does the same job no matter what kind of an engine or machine it is used in. Learning and training, on the other hand, serve different functions in different organisations and for different people in the same organisation. Thus, it makes little sense to try to refine or confine the definition to force it to mean only one thing.

A more fundamental drawback in using the idea that enterprises should adopt 'a learning culture' when urging them to invest more in training and learning is that, with the exception of educational and training enterprises, they are not formed *in order to* foster learning. They are established to create and deliver products and/or services. The learning they promote is designed ultimately to achieve business ends (which can include such ends as workers who are satisfied with their employer, have high morale and motivation). It would be inappropriate to insist that the *most* important aspect of an enterprise culture is that it delivers learning. The fundamental culture for a hospital, for example, is patient care; for a retailer it may be customer service; for a mining company or construction site it may be safety.

Learning contributes to enterprise goals. Maximising the contribution training and learning make to those goals is a feature of the *overall* enterprise culture—especially the nature of the interpersonal relationships in the enterprise. Instead of speaking of a 'learning' culture, it is more accurate to talk about having a culture which amplifies the value of training and learning. Just as with training, it is not a question of how much learning goes on in the enterprise, it is a matter of putting that learning to work.

Applying the concept of a culture that amplifies the value of training and learning

A number of ideas emerged during the course of this project about the way various stakeholders might use the idea of a culture that amplifies the value of training and learning. These are identified in this section.

- For enterprises

  When people in enterprises think about training and learning, they do so from two perspectives. One is about what *individuals* know and can do, the other is about the capacity of the enterprise as a whole to perform and innovate. Understanding the connection between the micro and macro—between the skill and knowledge of individual employees and the operation, productivity and profitability of the enterprise as a whole—is something many enterprises would like a better handle on.

Thinking about the ways the skill and knowledge of employees can be *amplified* may prove a useful perspective. On the one hand it requires thinking about means by which the skill and knowledge can be shared and spread to more individuals. On the other hand, it means thinking of ways the knowledge itself can be applied in new ways and through that imaginative, innovative use of it actually generate new knowledge.

- For training providers

  The idea that a partnership should be established between training providers and their clients is, of course, accepted. However, the evidence from our study is that training providers do not always understand sufficiently the employers' motivation in purchasing training/advice nor the cultural context in which it will be used. It may help everyone if providers were to do an initial 'cultural analysis' of enterprises—in particular looking for those features which impact on training. For example:

  - How will the training opportunity be interpreted? Will it be seen as a signal that the individual is respected and supported or as a sign that the employer is trying to squeeze yet more work from them?
  - Will the learner have openings to talk about and share the new skill, knowledge or attitude with co-workers?—this is key if the learning is to be reinforced and amplified.
  - Will the workplace actually allow the learner scope to exercise and further develop what has been learned?
  - What is the opportunity for workers to build on their existing knowledge by coming up with new possibilities and suggesting changes? How are new ideas generated and captured in the enterprise?

  These questions are merely indicative. The intent is to urge training providers and consultants about training to recognise that their 'product' needs to resonate with all the dimensions of the enterprise—from business imperatives and motivation through to shop floor climate. Sefton and Waterhouse (1996) came to a similar conclusion when they advise enterprises to move from a traditional training needs analysis to a total learning environment analysis in order to 'capture the holistic nature of learning and training' and its dependence on context.

- For VET policy-makers

  A prime focus of VET policy and programs in the past decade has been the need to cast off the image of Australia as a low skill/low quality economy (Curtain 1996). The evidence that has emerged consistently in this study and, indeed, in the whole gamut of recent Australian VET studies of enterprises, is that if skill development is thought of solely in terms of credentialled training, the policy goal will not be achieved. VET policy needs to encompass the whole range of strategies and tactics by which enterprises and individuals in them can develop their skill and knowledge.

  Policy also needs to recognise that it is not simply the amount, nor even the quality, of the training and learning which enterprises access, but the ways the skill and knowledge are amplified in the enterprise that makes the investment of time and resources pay.

Conclusions (2): What is convincing to enterprises?

Despite the differences amongst the Stage Two enterprises in size, industry sector, location, business environment and even in their attitude towards training and learning, it is significant that with two exceptions, the 21 firms we contacted were willing to commit time to thinking about training and learning for this research. Among the 19 participating enterprises, the material in *Building on other people's experience* captured their interest and *convinced* them to think again about their own approach to training and learning when:

1 The material 'clicked' with what they were already thinking about or had thought about but not acted on. Their attention depended on the timing of the material.

2 The interview with the researchers served as a trigger for respondents to explore their own ideas more fully. Their attention depended on talking about the material.

The fact that the process of using *Building on other people's experience* convinced our respondents to think about their approaches to training and learning is one thing. Whether they *do* something about it in the future is another matter altogether. And while most of the Stage Two enterprises responded to the invitation to think, they did have distinctly different ideas about what they would do (as detailed in the Stage Two chapter). It also needs to be remembered that we were not advising them to do one particular thing or another, but displaying for them the range of approaches to training and learning other enterprises had followed.

This chapter draws out the 'lessons' from the Stage two responses. It is structured in four sections. The first two describe how the two tactical aspects of connecting with enterprises—'timing' and 'talking'—are critical to arousing their interest in rethinking their involvement in training and learning. The third section considers what the differences in the responses of the Stage Two enterprises might contribute to any campaign to market the value of investing in training and learning to Australian industry. The final section considers how the findings and analysis of this whole study might be further developed and used.

Timing: Reaching an enterprise at the moment of need

The importance of timing—the material arriving at the enterprise at a time when the issues raised are already of concern—is nicely illustrated in the following example. Only three Stage Two enterprises specifically commented on the theme topic *Training as a way of helping your community* but in each case it directly connected with existing enterprise concerns:

- Cleandustrial: *I've been thinking about the idea of serving the community on and off for six months. We don't do that but I want to start. Partly because if you can show you do that, it helps in winning government tenders. But I would like to do it anyhow. One question I have had, though, is what kind of work experience I could give to students.*
- Boyanup Auto and Rural: *When I saw it, I began immediately to wonder how much more we could do to help create employment for the area. The advice about talking to the local school about their needs from business makes sense.*
- Anglicare South Australia: *Good citizenship has always been very important for this agency … Volunteers are one of our ways into the community but we need to think more about how the training we give them, or what more we could give them, could impact on the whole community. We've already had a few wonderful examples of how important it can be to volunteers and their families.*

Respondents often recognised that the material had arrived at an opportune moment:

> *If you had come to us 18 months ago, training in our industry was non-existent. But we've been investing a huge amount in training since—about half government money and half ours. But if you*

> *had come back then, we wouldn't really have had much to say to you. Now I am full of questions and your information helps, although it also is making me ask more questions.* (Airlight, Bond)

> *The changes in the community service sector have been immense in the last few years. Our total spending on training has actually gone down as we try to be more strategic about what we do. I'm going to use the booklet in the big planning day we have coming up for the management team to help us focus our training plans.* (Mofflyn, Farriss)

> *'I think the whole booklet is excellent. I re-read it again last night and this morning and was reminded of that. But I have to say I also got pissed off with it. With the culture one I wrote down: Where are their measurements??!! How do they know morale is high??!! Then I realised it was just jealousy on my part. Everything I read I kept thinking: That's us—that's what we could be.*
> (Anglicare, Blackwood)

The question of timing also shaped the response of enterprises that did *not* engage much with *Building on other people's experience*. The company which eventually pulled out of the study, for example, pleaded a spurt of work and that they would be interested in talking to us at another time. The personnel development manager at ACI Glass in Adelaide, who met twice with a member of the research team, was so focussed on ACI's new multi-million dollar formal training program that until it is bedded down, he was not in a position to properly consider our material. However, the idea of seeing whether the culture at the plant changes as a result of the training regime is something that interests him and he may well use *Building on other people's experience* with employee committees some time in the future to explore workplace culture at the plant.

One enterprise which did not spend much time with *Building on other people's experience*—Tuki Trout Farm—appeared to have relatively little to learn from it. Although pressure of work was a factor for them, too, basically the time had passed when they might have used it to effect. They were already paying careful attention to the climate in which the skills of all personnel are developed and they used a wide range of tactics to do so.

While it is hardly a surprise to find that engaging enterprises depends critically on reaching them at the right moment, this study does provide a range of *documented* examples to illustrate the case. Timing will determine to a significant extent the response of an enterprise to overtures and information about training and learning from outsiders. Presumably, timing will equally influence the way they respond to questionnaires and surveys.

There is a second issue which is relevant to engaging an organisation: reaching the right person in the enterprise. This study of the Stage Two enterprises did not furnish enough information on that problem to resolve it. The more people in an enterprise who saw *Building on other people's experience* and talked about it, the greater its impact was, of course. The research team was a little disappointed that few managers distributed the material to more levels in the organisation. Their decision may have been prompted by the thickness of the printed booklet. Whether the take-up of the material would have been extended if the material had been presented via video or a CD-ROM or in smaller chunks (i.e. each case study and theme in its own more visually enhanced pamphlet) is one that warrants further investigation.

Talking: The material as a prompt for conversation

How would the Stage Two enterprises have responded to the material if the research team had not gone to talk to them? If we had simply sent the booklet and prompt questions, would they have paid as much attention to it or thought about it as deeply? Since the research design did not include a control group, we cannot directly answer the question. However, from the evidence at hand, it appears that they would not have.

Two lines of evidence support this conclusion:

1 Many of the interviewees commented that our arrival was like a deadline:

> *Originally I just flicked through it but yesterday I went through it page by page and looked at it in detail, and I'm very glad I did.*
>
> *I re-read it again last night.*
>
> *I finally got through it all last night.*

We were left with the clear impression that without a set meeting date, other things would have taken precedence and the actual task of engaging with the material often would have stayed a second-order priority.

2 Many of our conversations with the people in Stage Two enterprises became rich learning experiences in themselves. We were able to observe the interviewees' interest in the material grow as we probed their ideas and they probed ours. For example:

- At the Ballarat Visitor Information Centre, the manager and the member of the research team began to think about the array of people who might be considered almost inadvertent volunteers in the centre's work—for example, gardeners in the local parks who are asked for directions, service station proprietors, shopkeepers and artists. So the two began, enthusiastically, to think about ways they might develop this connection and exploit it.
- The director of SED took almost as many notes as the interviewer as they explored how the company might better use some of the informal strategies for learning and sharing which were suggested in *Building on other people's experience.*
- At the Airlight Group, in the middle of the group discussing whether participating in on-going training might improve staff retention, the group managing director, Jim Bond, suddenly asked, 'What does it cost us to employ someone? A hundred dollars?'. Dissenting mumbles round the table. 'No, I'm sure it's more than that' … 'I wonder' … As the musing proceeded, Bond said, 'This talk is interesting. It raises questions'.
- The training manager at iinet said during the interview over coffee, 'I like receiving this kind of material. It makes me think and reflect. But even more, I like talking about the ideas like this.
- In the interview with City of Albany, Chris Grogan and the interviewer began to talk about the balances that need to be struck between formal and informal learning. At which point Chris said, 'We need to have the kind of discussion we are having right now much more broadly … you know, most organisations have only one or two people looking after this sort of thing and they're very isolated'.
- Sandra Bresneham at Wanneroo City Council said in the interview, 'It's a shame we can't fly our managers around to visit some of the case study sites so they could hear those people talk about their life's learning experiences in the flesh'. As we considered the possibility of finding local sites to visit, the idea also developed that the 17 managers at Wanneroo could be coached to think about their own life learning experiences as a way of generating some fresh thinking internally about skill development.
- The training manager at Godfrey Hirst started the interview by saying he didn't much like the themes and issues section and that he found the case studies much better. But as we talked about some of the ideas he found important—like mentoring, training manuals, and setting expectations—he remembered that some of this was in the material in the first part and that it had, in fact, been useful.
- One interviewee confessed to being puzzled by the Change Management Table in the 'soft skills' theme. When the ideas behind it were further explained, the person became quite enthusiastic and keen to use it.

It is worth noting here that the development of lively conversations—indeed, of learning conversations—during the interviews was as characteristic a feature of the encounters with enterprises that were not going to carry on using the material as it was with those that were. In terms of the categorisation of Stage Two enterprises as more or less likely to be influenced over the medium term by *Building on other people's experience* (pp.32–34), the examples cited above have the following distribution:

- ❖ 2 are 'cluster one' enterprises (the ones having little intention of engaging further with the material or applying it)
- ❖ 4 are 'cluster two' enterprises
- ❖ 2 are 'cluster three' enterprises (the ones most interested in changing their whole workplace culture)

We believe that what helped all of the interviews to be productive was that the original material was suitably memorable. The interviewees could recall, and did liberally sprinkle their conversations with, anecdotes and quotations from *Building on other people's experience.* There is a bit of voyeurism in most of us, and we were not unmindful of that in constructing the entries. Experience is an excellent teacher and, while the stories deliver at best only a vicarious experience, it is, nonetheless, an experience. The fact that none of the content was startlingly new yet was able to make a strong impression on its readers calls to mind the line from Marcel Proust:

> *Discovery lies not in finding new lands but in seeing with new eyes.*

It may also be the case that the material created a convivial context for the interviews because it did not operate from a deficit model. The booklet implicitly (and deliberately) said to its readers, you are no doubt knowledgeable and well intentioned already: here are some stories and ideas from other enterprises who may be a bit ahead of you or merely doing things differently from you—have a look. We probed to detect whether any of the Stage Two enterprises thought that the Stage One cases were 'too good to be true'—so perfect that there was no point in trying to emulate them or learn from them. Not one person responded in that way. Indeed, time after time what we heard was 'I could see us in that example …'. The material was pitched to encourage enterprises not to dazzle them.

Lessons for marketing training and learning to enterprises

Marketing campaigns are usually based around a matrix consisting of three principal elements:

1 the target audience(s): the whole of the intended population segmented according to one or two key characteristics

2 the message(s) to be directed to each segment (and why)

3 the channel or modes of communication which would most effectively reach each audience and through which the message would be best understood

This section examines each element of that matrix in turn. It concludes with a few thoughts on the idea of developing an *Australian* culture of training and learning—an appetite for training and learning embedded in our national character.

Segmenting enterprises

Just as advertisers segment the market for new cars by gender and age, so might certain characteristics be used to discriminate amongst enterprises in such a way that one segment is likely to be influenced by one message about training/learning and another segment by another message. Research has suggested two lines along which enterprises might be divided:

- according to the factors which are known to drive enterprises to increase their training effort. Hayton et al. (1996) in a series of case studies developed a model which identified six factors as influencing enterprises' commitment to training: workplace reorganisation, new technology, introduction of quality protocols, awards or industrial agreements, performance management, and business plans which include training. Any of these (or some combination) could, in principle, be used to create specific target groups.
- according to the enterprises' current attitude towards and use of training/learning. The National Marketing Strategy for Skills and Lifelong Learning in Australia (Quay Connection et al. 2000a)—which is generally referred to as the ANTA marketing strategy—segmented employers into three groups on the basis of their responses to a telephone interview survey:
  - 'high achievers' (44%): who value all forms of training (on- and off-the-job, including non-work employee learning); are likely to offer more training in following 12 months
  - 'here and now' (37%): who value training but prefer on-the-job training and do not value non-work employee learning; are likely to offer training in following 12 months
  - 'not interested' (19%): who see problems associated with training (including the cost); are least likely to offer formal training to their employees in the next 12 months

A significant difference amongst the Stage Two enterprises in our study was the interest they exhibited in the informal learning strategies the Stage One enterprises were using. Some were very taken with specific tactics for introducing informal guidance and moving away from a reliance on pre-specified learning outcomes and many of these focussed further on the idea of shaping the whole culture to influence learning. Yet others were a little distrustful of informal approaches and were less enthused by the material in *Building on other people's experience.* Although these divisions are real and interesting, it is our view that it would not be useful for marketing purposes to segment enterprises in terms of their preference for 'formal' or 'informal' learning/training. The distinction between the two approaches can too easily be exaggerated: they are not opposites; they do not place enterprises in opposing camps. The Stage One enterprises which most convincingly used their culture and informal modes of learning to enhance skills and develop knowledgeable practice were also most insistent that formal training had an important role to play.

The criterion we would propose for segmenting and characterising enterprises is the learning outcome wanted. At first sight this may appear a naive ground. It sounds a bit silly to point out that enterprises engage in learning/training so individuals (and the organisation) *learn* things but there is evidence to support the tactic. Respondents from both the Stage One and Two enterprises in our study made it clear that when their organisation (and individual employees) put in place arrangements for learning/training—irrespective of the degree of specificity or formality—the goal was simply and unambiguously to acquire skill, knowledge, or insight that could be put to work. A larger study by Kilpatrick and Crowley (1999) also observed that enterprises, in the first instance, think about their involvement in training and learning directly in terms of what they want learned e.g. to glean new business opportunities or to solve a particular problem. Indeed, the ANTA marketing strategy survey found that enterprises engage in training/learning to fill gaps in the existing knowledge or skill base.

Table 2 illustrates possible enterprise 'segments' which are suggested by our study, the Kilpatrick and Crowley survey (1999) and the ANTA marketing strategy survey (Quay Connection et al. 2000a).

Table 2 is only indicative, but seems robust enough to suggest that segmenting enterprises on the basis of the applicable learning required may be a useful tactic. Mulcahy (2000) also described enterprises' involvement with training/learning in a way that fits with this approach to segmentation. Moy and McDonald (2000) provide a taxonomy of some 50 common outcomes enterprises seek from training and learning. The list is based on a thorough and detailed analysis of the literature on returns for investment in training.

The advantages of segmenting enterprises directly in terms of the learning they want to acquire include the following:

- It focusses attention on the skill, knowledge—one might say on the stock of human and intellectual capital—in Australian enterprises. Increasing that stock is the specific problem which the VET sector is expected to help solve.
- It de-couples training and learning from business results. There is a school of thought that says enterprises will only become committed to training/learning if they can see the results clearly on the bottom line, and it is true that skill and knowledge in an enterprise contribute—and sometimes can be shown to contribute directly and significantly (see, for example, Blandy et al. 2000 and Maglen, Hopkins & Burke 2001)—to an enterprise's overall success. Nonetheless, training/learning is never the sole factor in success, as that research and many of our enterprises pointed out (see pp.29–31). It is also the case that enterprises with a very skilled, knowledgeable and imaginative workforce can fail or falter in their final business results. So while the bottom line is a key consideration, it is a by-product. There may be advantages in decoupling the two so the results of learning can be seen in their own right as builders of human, social, and knowledge capital which the enterprise can then invest for profit. The importance of enterprises understanding their stock of knowledge and skill is a recent management tenet (Sveiby 1997; Hansen & von Oetinger 2001).
- It makes clearer that just as different learning outcomes are required, so there is a myriad of different ways to achieve those outcomes. An immense amount of vocational learning takes place quite independently of the formal VET system in Australia. It may be that if the map of different outcomes (and consequently of different mechanisms for learning) were clearer, the policy demarcation between formal, certified development of skill and the equally important internal development of robust cultures of 'bottom up' workplace learning might become less of a policy gap.
- It underscores the fact that a number of individuals in an enterprise may have roles to play in fostering different aspects of learning/training (including 'shop floor' workers).

Table 2: Segmenting enterprises in terms of learning outcomes

Learning outcome	AAAJ consortium study	Kilpatrick and Crowley small business survey	ANTA marketing survey
Specific skills to comply with external standards	Examples: Harvey Beef to obtain license to export beef Airlight Group to win a Worksafe silver rating Cleandustrial—to meet government tender preference	Almost half the small businesses surveyed who had attended a course did so because they were required by law, an award, customer or supplier.	Only 3% of respondents said they engaged in their single most important form of training to meet OH&S or other government regulations.
To meet an enterprise's internally identified need for action (including need for innovation)	Examples: Salty Seas to solve the myriad of problems in developing the business—e.g. maintaining the right temperature in the packing room; setting up live fish tanks O'Reilly's Guest House to multi-skill individuals who work in an isolated location Pretzel Logic to stay ahead in the frenetic race in web site design	Prompts for undertaking any type of training or learning activity included: improve efficiency 51% ongoing training, keeping up to date 45% solve a problem 29% Mentors and consultants were cited as the training 'source' most likely to be used for solving specific problems.	Employers were asked what (if any) specific training they planned to offer in the next 12 months: technology/computer IT 19% first aid, OHS 12% marketing, sale skill 7% tax, GST, finance 7%
Changing the way people at work relate to one another—to change the culture	Examples: Stelform Engineering wanted more open communication about sensitive issues Simplot Kelso wanted the lines to work as self-reliant teams Anglicare South Australia wants to reinvigorate a culture where people take the time to learn through conversation and reflection	Possible synergy between training/learning and workplace culture was not specifically addressed but the authors did conclude: 'A change in attitude toward a learning culture in small business must be accompanied by easy access to relevant learning and training.'	[No questions addressed the way workers relate to one another or about changing the nature of the workplace environment.]
Identifying a new business opportunity	Enterprises in both Stages One and Two were selected specifically because they were involved in local networks: Stelform Engineering through HunterNet ; the Ballarat businesses through BRACE; Harvey Newsagency through the Leschenault Business Enterprise Centre, the Kalgoorlie businesses through the Goldfields Business Enterprise Centre . As intended, all participants used these networks to get ideas about new opportunities.	In the survey of 181 small businesses, the prompt 'seek new opportunities' as a reason for undertaking learning activities was cited 152 times. Attendance at seminars and meetings was the way the businesses learned about new opportunities.	Employers were asked how important a number of statements were in influencing the company to offer more training, either formal or informal. The statement *Training brings new ideas and innovations to the business* ranked third with 80% of employers saying it was very important or important.

To suggest that one way to segment the enterprise 'market' for training and learning is directly in terms of the learning to be acquired and applied is not to suggest it is the only way. Indeed, an argument could be made that it is too simplistic—a retreat from the sophisticated need to think of, and evaluate, training/learning in terms of Kirkpatrick's highest level measuring 'real' business results (Fuller & Farrington 1999, p.85; Boverie et al. 1994). However, what we are concerned with here is segmenting enterprises for marketing purposes. Those big final rewards may be so dependent on the internal dynamics of an enterprise that it treads the line of false advertising to promise the distal end when all that is actually being sold is the development of skill and knowledge and attitudes.

The proposal that enterprises might be segmented according to the specific outcomes to which new skill and knowledge needs to be applied seems to have enough substance from our and other Australian research to merit further development. It is not opposed to the current ANTA marketing strategy of discriminating amongst enterprises by their attitude and behaviour towards training/learning but a refinement of it. It is a way of viewing the need for learning/training in terms the enterprises themselves use rather than in terms of an outsider's calculation of how much (or how little) learning/training is encouraged and applied.

Messages

One of the most important findings of this study—and we cannot emphasise this too strongly—is that enterprises appreciate getting *real* detailed insight into how other enterprises operate. They pay attention to how *exactly* problems or issues of concern to them have been handled by others. Time and again we were told that the 'messages' in *Building on other people's experience* were worth reading because they were honest, candid and lively and, therefore, carried genuine authority.

That finding needs to be thoroughly understood and enacted in any strategy to market learning/training. Abstractions and simple good news stories of the trust-me-training-worked-for-me variety have very little power. They are not convincing. To be convincing the teller has to truly share, not preach, and acknowledge the potential difficulties as well as the rewards. A good story depends on light and dark.

As the ANTA marketing strategy research surveys found, most people do not have to be sold on the value (and even the pleasure) of learning. It may be the case that enterprises, like individuals, who have not pursued further learning may have some justification, including having gained little value from it in the past. Their reasons for hesitating need to be acknowledged: people do not respond well to being criticised for not being currently engaged in learning.

It was also brought to our attention by enterprises in Stages One and Two that training awards do not always inspire other enterprises to follow in their path. There are a number of reasons for this. Sometimes the award winner appears to have special unmatchable qualities or advantages. At other times the award can seem a little patronising. Most damaging, however, are the occasions when the enterprise which received the award is not highly regarded locally. There is a persistent danger that training/learning will be oversold.

The specific content of messages designed to encourage enterprises to lift the skill and actionable knowledge of its workers will depend on circumstances—and the exact intent of the marketing strategy. The one thing we would urge, in every circumstance, is that vocational education and training not be portrayed as merely 'filling' individuals with skill and knowledge already known elsewhere. It should be depicted as a genuinely inventive activity where ideas and new capacity come from people's imagination and, especially richly, from talking and thinking with co-workers. In a similar vein, it is important to *observe* and assess workers' (and managers') skill and knowledge but it is as important—and perhaps more fruitful for the enterprise—to *ask* workers (and managers) what they have learned and whether they have applied it and if they have not, what has blocked them.

Channels/modes of communication

Of the many available modes of communication—print, video, voice, multimedia, CD-ROM transmitted by fax, phone, teleconference, email, the press, the post, broadcast, the Internet—the methodology of our study accessed only five: print-based materials; postal delivery; the telephone; email; and face-to-face conversation. In other words, our lines of communication in 'marketing' *Building on other people's experience* to the Stage Two enterprises were narrow, even old-fashioned.

There are a few points, nonetheless, which can be made on the basis of our study that ought to inform any decision about the channels of communication to use in marketing ideas about training/learning to enterprises:

- Maximise the extent of personal and direct interaction with people in the enterprise

  The tactic we used to understand whether (and why) the material in *Building on other people's experience* was convincing to the Stage Two enterprises was, in essence, to make 'house calls'. As documented earlier in this chapter (pp.49–51), the importance of *talking* about the material—so people in the enterprises could ask questions, probe our ideas and we could, in turn, help develop their thinking, should be benchmarked as the 'most desirable' way to interact.

The meetings with the Stage Two enterprises mirrored the 'learning conversations' we had already noted in Stage One enterprises and reinforced the observation that conversations matter. People learn from talking. Not only do they learn in the sense that they acquire new ideas, but the conversations also serve as a motivator. They add a nudge, at least, towards action.

Interactivity through multimedia and electronic forms of communication is becoming more and more imaginative and effective. The key to using these new channels will be the extent to which they allow true interactivity between the sender and receiver of the message—for example, the recipient enterprise is able to interrogate the material, even play games and challenge the scenarios presented in the material.

- Interact with as many people in the enterprise as possible—the more the better

  One of the important lessons we learned in Stage One where we had two days, as a rule, on site speaking with people at every level in the enterprise is that critical thinking about learning and skill development occurs at every level in enterprises. This is in line with Billett's (2000) observation that the equation for workplace learning contains two terms—affordance and engagement, and engagement is a decision each employee makes.

  The tenor of response to *Building on other people's experience* was of a noticeably different order in Stage Two enterprises where the booklet was distributed by management to a number of people in the enterprise, but whether that was a cause or a consequence of management's initial interest in the ideas is unclear. It *is* clear that once a number of people started to talk about the ideas amongst themselves, the level of interest tended to spiral upwards—an effect that is well known, and wisely used, in marketing (Windahl & Signitzer 1992, p.53).

- Use existing networks which link enterprises to one another:

  This study and others (for example, Kilpatrick 2000; Kilpatrick & Crowley 1999) have observed the importance of business and professional networks in injecting new ideas and resilience into participants. One aspect of their importance, which we had not fully appreciated at the start, is that enterprises are often loathe to contact one another directly and need to be brought together through the auspices of a broker who generates the network—for example BRACE in Ballarat, HunterNet in Newcastle, the business enterprise centres in Bunbury and Kalgoorlie. We had expected that Stage Two enterprises might actually contact Stage One enterprises since enough detail was available for them to do so. Some said they would have liked to, but clearly felt it inappropriate to do so.

In sum, to market ideas about training and learning to an enterprise, the messenger has to be honest and respectful and needs to be able to listen to and answer questions from the enterprise. Those precepts hold no matter who the messenger is: ANTA, a State training authority, an industry training advisory body, a registered training organisation, a private trainer or training consultant. There are many messengers trying to convince enterprises that they should do 'more', or 'different', or 'better' in terms of developing the skill and capacity of their workforce. If enterprises do not heed the messages, it is not necessarily because they are being wilfully intransigent.

An Australian culture of training and learning?

The idea that a culture which actively encourages learning and skill development ideally ought to be national in character, part of an Australian identity, needs to be carefully considered. The importance of a society's culture and values in determining its economic development was the subject of a Harvard Academy symposium featuring some of the world's most respected scholars from a variety of disciplines (Harrison & Huntington 2000) and their assessment that culture does indeed matter has put the issue squarely on the international agenda.

Kearns and Papadopoulos (2000) specifically addressed the influence of national culture and values on the way links are forged between skill formation, learning, enterprise and innovation in five OECD countries. They compare Australia's policy framework, resources and culture to those of the five and conclude that Australia has serious work to do if it is to create those links and inspire a desire—preferably, a demand—for lifelong learning in every one of us. They note, for example, the imbalance in the high esteem traditionally given to academic achievement and the lower status awarded vocational and trade qualifications in Australia. They might have added (had it been available at the time), the troublesome finding in the ANTA marketing strategy survey (Quay Connection et al. 2000b) that Australians, while they like learning, found formal study and education *of every sort* a less than rewarding experience.

The model which is sometimes held up to Australians is the way we have a sporting culture which far exceeds that of other nations (Schofield 1998). It is a slight exaggeration, but only slight, to see this sporting culture as a very specific instance of a training/learning culture. There is the dedication to skill development by individuals, the way particular sports change in response to the learning and skill accumulated, and the extensive informal learning conversations about sport in the broader community. Nonetheless, it is not likely that the general community will see sport as a convincing exemplar of vocational education and training and apply its lessons to workplace skill and enterprise development.

A few observations gleaned from the Stages One and Two enterprises might contribute to the development of an Australian culture that values vigorous training and learning. The observations are briefly outlined here:

- The managers of many of the enterprises actively participate in networks—regional, industry-sector and professional. Thus, while they are predominantly, and rightly, focussed on making their own enterprise effective and successful, they are not indifferent to the wider community and recognise the value of mutual learning webs. Strengthening these inter-enterprise networks may be an effective lever for growing an interest in high skill training and learning and spreading it through the culture. External support for these networks must not allow them to become bureaucratic; their spirit of informality and volunteerism needs to be maintained. One must also be careful not to *tell* these networks that training and learning is a 'good thing'. The groups need to determine what is a 'good thing' for themselves and build on that assessment.

  Employees have lives outside of work and they often participate in community activities. It may be interesting for an enterprise to do a stock take of this participation, encourage it, and possibly use it to further develop its own 'official' links with the community.

- An Australian sense of egalitarianism and openness could be observed in many of the enterprises we visited. This suggests that workplace learning which depends on sharing skill and knowledge, helping one another, is not antithetical to the Australian character. It is true, of course, that workplaces are contested arenas and that no utopian picture of universal sharing and caring amongst workers in Australian workplaces should be drawn. Nonetheless, managers can shape the culture of their workplace so it develops into a supportive environment and one in which most people are willing to help one another. A few of the enterprises we spoke with had been through serious industrial relations problems but reported that they had repaired or were in the process of repairing the damage done to interpersonal relationships during the confrontation.

- The most notable *missing* ingredient in developing a national culture where learning and training take precedence is that training providers themselves do not appear, as a general rule, to have a strong and compelling optimism about their capacity to build a very highly skilled and dynamic workforce. There are many exceptions, but the anecdotes detailed in our study, where a number of enterprises had been disappointed with the level of the training received, combined with Schofield's (2000) systematic findings of quality lapses in the training of apprentices and trainees indicate that precisely where one would expect the vision and energy for a cultural change come from—from the training providers themselves—both are in short supply. If we are to grow a culture of learning/training that in any way approximates our sporting culture, we must be able to share an unwavering faith in the capacity of training and learning providers to lift our game.

The majority of the enterprises we spoke to, in both stages of this study, want to have workplace cultures where people get on well with one another, support one another and where the knowledge, skill and capacity of individuals and of the enterprise expands. They are, understandably, not always sure how to accomplish this. This kind of workplace is not the tradition in Australian industry so people at work now have to invent things for themselves without familiar exemplars. The positive aspect is that from our study it appears to be relatively easier to do these things in small to medium-large enterprises than in enormous multi-national conglomerates—and small to medium-large enterprises are the mainstay of the Australian economy.

Where to from here?

We undertook this project without any pre-conceived ideas of what would be convincing to enterprises about training and learning. What we found was that across the wide range of size, industry and location, enterprises were interested in the way informal approaches to training and learning—in terms both of guidance and goals—could contribute to the development of skills, knowledge and innovation in an effective and cost-effective way. They recognised, too, that once informal approaches are adopted, workplace culture plays an essential role: the values and relationships amongst employees (at all levels) determine the usefulness of the strategy.

In view of these findings, it might be useful to refocus the material in *Building on other people's experience*—especially the themes and topics; possibly including a few more case studies—so it specifically concentrated on informal approaches: the types, how they work, how to impose discipline and rigour on them, the interplay between the formal and informal, the way they relate to the perennial problems of cost, staff retention, external regulation and the demand that enterprises prove their capability. Authoritative and enterprise-friendly information of this kind is largely absent from the VET sector at the moment.

Any revised set of materials should serve as the basis for what, in effect, would be a new stage—almost a Stage Three—of this project. To be of maximum value, four considerations should apply to further work:

1. The material should be produced in many formats, including highly visual versions, so that it is attractive and useful to workers across the enterprise.
2. The way the revised material is used by enterprises should be the focus of a longitudinal study far more thorough than was possible in Stage Two of this project. Enterprises (or at least a selection of enterprises) that receive the material should have a mentor/researcher who would work with the firms over at least a 12-month period as they invent and implement their strategies. The process and outcomes would be carefully observed and recorded.
3. These enterprises should be re-visited at yearly (or more frequent) intervals for several years because one of the least understood or researched aspects of training and learning in enterprises is of the way strategies decay or amplify over time.
4. It may be wise to select 'Stage Three' enterprises from industry sectors which Australian policy has prioritised as ones in which an increase in the skill and innovation of the workforce would have the greatest impact on the Australian economy.

It is our sense, and that of many of the enterprises and other researchers we have spoken with about our project, that the rich insight and material generated in Stages One and Two ought to be further developed. The work has opened up new possibilities and to realise the full value of what has already been accomplished, much interesting work lies ahead. To phrase it in the vernacular—the project has more legs yet.

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NCVER

The National Centre for Vocational Education Research is Australia's primary research and development organisation in the field of vocational education and training.

NCVER undertakes and manages research programs and monitors the performance of Australia's training system.

NCVER provides a range of information aimed at improving the quality of training at all levels.

ISBN 1 74096 010 6 print edition
ISBN 1 74096 011 4 web edition

Appendix to

What convinces enterprises to value training and learning and what does not?

A study in using case studies to develop cultures of training and learning

Case studies collected by
Jane Figgis, Anna Alderson, Anna Blackwell,
Anne Butorac, Keith Mitchell, Ann Zubrick

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HARVEY BEEF

Harvey, WA

A family-owned meat processing company with 510 employees, its interest in training beyond the bare minimum is quite recent. But it is already receiving training awards and reaping business dividends.

E G Green and Sons, trading as Harvey Beef and Balmoral, is a family business which began in 1919 by Ernest George Green and his wife Emily.

Harvey Beef is a meat processing company, located in the South West of Western Australia and is described by its employees as a'very fair, family business, with personal clients and a growing export market'. The company varies in size from 320 staff up to 510 staff in the busier months of September through to early March.

The walls of the reception area reflect the feel of the company. Impressive awards such as the 1996 Deloitte PBS/BRW Top 500 Private Companies Plaque and the 1984 CCI Company of the Year Award share pride of place with the Green's Occupational Safety and Health Policy, a Certificate of Accreditation by Aus-Meat Limited and acknowledgment of the company's recent participation in the Foodsafe Basic Foodhandler Training Program. The company also boasts being the current champion of the RCA President's Cup Golf Challenge. The company and the staff seem to be both modest and proud achievers.

Tony Bandera is now the Training Officer at Harvey Beef. He started working for Greens some 25 years ago. 'I started working here in the 70's when working in meat works was a place you went until you got a real job'. But today, there is a real sense that Harvey Beef has helped to change that way of thinking in its staff and some of that change is directly related to the new Chief Executive Officer, Gary Minton's, push for training throughout the last two years. Tony believes that 'upper management valuing the process is of significant importance to training outcomes - and they are behind it 100%'.

WHY VALUE TRAINING NOW?

There are varied reasons behind Harvey Beef's support of training. As with all meat processing companies, Greens needs to operate at a profit, it needs to produce a quality product and it needs to ensure that food safety standards are met and exceeded. Tony firmly believes that 'training is the key to maintaining the bottom line'.

Harvey Beef is also an exporter and benchmarks its quality assurance processes against those of the USA. The Plant undergoes inspections by American auditors on a regular basis to ensure it is compliant. For Harvey Beef, training of staff in safe handling procedures is not only important for profitability, it is a legal requirement.

Prior to 1998, Harvey Beef had a system of on the job learning which really took the form of people new to an area learning from those with experience. Staff requiring specific training in occupational health and safety aspects were given access to courses run by external trainers in-house. Learning from each other is still a very important and dominant part of the learning culture but the advent of the National Training Packages in the Meat Industry brought about some significant changes in staff development practices at Harvey Beef.

Management appointed Tony as the training manager and a training committee was established to oversee training processes and to review achievements, assessments and Training Packages. The plant identified a handful of training champions: volunteers who were keen and positive toward training and highly skilled in their jobs. Financial incentives were offered for these staff to work their way through the Certificates II and III and to take on additional duties and learning in order to become trained assessors.

Tony already had qualifications as a Australian Quarantine Inspection Service (AQIS) Food Inspector (level 4) but he opted to work his way through the levels of the Training Package rather than be recognised for his prior learning. In this way Tony was able to experience first hand what was involved in working through the certificates and, in a sense, became a role model for others. He worked through Certificate II and III in meat processing and completed Certificate IV in workplace training and assessing. Tony has now also completed a Diploma in Training and Assessment.

Harvey Beef had previously been closely affiliated with a private training organisation but determined that the plant should become a registered training organisation in its own right in November 1999. As Tony explained:

> *Many of the people working in the meat industry didn't like school and so we did away with the suits and ties. We found it was less intimidating if you got rid of the feeling of having everyone in a classroom.*

At Harvey Beef a lot of small initiatives have been put in place by the assessors and committee members which have resulted in some very powerful successes. The National Training Packages were customised so that the examples and exercises were specific to their own Meat Works. The modules contain pictures of the staff working at the plant. The modules are kept small and relevant so that they don't appear too daunting.

When staff express an interest in starting to work their way through the Training Package they are shown the modules and the learning tools available to help them, e.g. books and videos. A special CD ROM has been designed to help people through the occupational health and safety standards. The CD ROM will read the written text out loud and people can take tests on line which are self paced and spell out the reasons why an answer is right or wrong. It will even cheer you on when you get the answer right!

HOW IT WORKS IN PRACTICE

Nicky Jamison, a leading hand in the packing room, was one of the original, training champions. As she describes it:

> *The development of the materials was a hard task but it has really been worth it. At the Meat Works training occurs on the job and then off the job in the training rooms. We use small groups, self paced books and computer programs. Recently a group from different sections of the plant went through Certificate II and III together. They gave each other tours of their own sections. It helped everyone understand more about each other's jobs and the plant as a whole. Also, some conflicts people had with each other in the past have been overcome by having people undertake training projects together.*

Nicky Jamison has worked for the company nearly five years now. Previously Nicky worked in Broome and other parts of Western Australia as a cook. When Nicky started at the plant there was no formal training program. She quickly volunteered when asked to participate in the training modules because she has always been keen to learn:

> *I see formal recognition of skills as a way for a person to advance and training as a way to better yourself. Doing that further training gave me the chance to become a leading hand and this month I am helping Tony with the training management side of things. I didn't finish school so getting my certificates is turning that around for me.*

The training area is very hectic at this time of the year, it is June and in September the second shift begins and the numbers on the plant swell. The training area is getting a head start on training people in occupational health and safety standards, the preparation of meat and equipping people to handle the pace in the coming months. The surplus of leading hands when the shifts go from two to one has meant that Nicky is free to help with this hectic schedule of training.

There's a big influx of training at the moment as people start training to prepare for the second shift. The new packers are being signed up for Certificate II. The new recruits are from varied places. Some are seasonal workers who regularly return to Harvey Beef for the busy season. Others are from the surrounding districts and some have a long way to travel each day. The double shift this year will be different from before. Workers will have a 7-day fortnight in a two days on, two days off cycle and there will be two shifts. The change over from one shift to two and back again is a difficult period for the plant as people get used to new roles and ways of working. The early training initiative will hopefully help to reduce the problems.

Nicky has noticed that all this training has led to changes in attitude more than anything else:

> *People are thinking differently. When people are not aware of systems they don't understand them and don't appreciate them. When a person doesn't wash their boots now the others tell them to because they know why it is important.*

Vince Holt is a renderer at the plant and also the occupational health and safety representative and union delegate. He started off at university doing a science degree, moved into corporate management and then moved to Harvey where he has worked for E G Green for the past four years.

In the rendering section there is a manager, three leading hands and eleven other full time workers. Vince explains:

> *Rendering is a process where the garbage from the meat gets made into five separate products; tallow, meat meal, blood meal, blood & bone and gall. The effluent ponds can be used for making topsoil. Local customers are the buyers of the tallow and there is some local and export markets for the fertilizers.*

In the rendering section of the plant national standards for accreditation apply and the Rendering Association reviews the accreditation each year. Vince makes it clear 'no high quality product buyers will buy from non-accredited companies. It makes good business sense to have an accredited workforce'

Vince recently played a major role in getting management to agree to new enterprise bargain awards by showing that through training and reward schemes the renderers could increase profits and potential profits for the company.

> *Customers would be crazy to buy from an unqualified workforce. The selling has to be internal and external. Sell the workforce and their standards to the customers and sell the idea of training to the*

> *workers. Through training the staff are given the confidence to know they can meet new productivity demands and expectations.*

Being on the occupational health and safety committee has given Vince the opportunity to mix with management and to share ideas. He has learnt a great deal informally through being able to participate on the committee which is a joint initiative between management and unions. Vince recalls

> *There was a time when the blokes would walk straight through a hazard, get hurt and then make the same mistake the very next day. Training in health and safety has made them into health and safety reps overnight.*

Attitudes toward training in the rendering section have not always been as positive as they are today. An original promise from management to send renderers to Wollongong for a two-week training course never eventuated and this caused a little pessimism about the new training system at first. In November the renderers attended a half-day seminar run by a person from the Eastern States on hygienic rendering. It gave them a sense of how important it was to get their job right and that thirst for knowing the *why and why not* has meant that the renderers are now working on Certificates II and III.

Vince sees the benefits of training operating on a number of levels.

> *Personally, training has given me some confidence. I am sure now I could do a good job as a leading hand if the opportunity came up. From a management perspective an educated workforce is easier to manage, an educated workforce sells a product and adds value. So, everybody wins every time.*

Shayne Johnstone is a boner and this is his second season at the meat works. Shayne left school in Year 10. His dad told him if he could find a job he could leave school, he was so keen he found a job that very same day. The job was that of a butcher's apprentice. Many years later his trade qualification and experience as a contractor for major supermarket chains has meant Shayne is well qualified to work as a boner. Never the less, when Shayne started at Harvey Beef he had a lot to learn about working on a fast production line for a major exporter and he was given six weeks of one on one supervisory training on the line. 'I had to change my style and get quicker'.

Later Shayne was asked if he would train some of the packers in knife sharpening and he attended a three-day course in training small groups. Shayne has also completed his Certificate II and his practical work in Boning Certificate III. He has booked himself in to sit the theory component on Tuesday and showed me the carefully folded theory test he would need to study for on the weekend. Shayne is a little reluctant to do the theory parts because he finds the reading side of things hard but, his wife helps him out and so do people like Tony. He still wishes there was a CD ROM for the Boning Certificate though.

Shayne describes his experiences at Harvey Beef as great: 'I've never been happier in a job, I like the job, I like the place and I'm happy with the money'. In fact, Shayne is so happy that he undertakes to drive from Rockingham to Harvey everyday – an over 200 km round trip - just to do the job.

Of all the training he has received, Shayne is most impressed with the Yield Course which shows how you can get the most out of a body of beef. Shayne was shown how he had missed a seam when boning and it was explained in monetary figures how much loss that was to the company per year if he was to do that every time. There was an added incentive to fine-tune his skills in this area: the company has a share profit incentive for employees. 'The more accurate we are the more profits we make.'

There are eighteen boners at present and when a small group comes back with new skills and knowledge they share it with each other.

The yield training is a classic example of how training has translated to increased profits for the company. The investment in training has paid off in other ways too in that the American auditors have reported less non-conformity in the quality assurance standards.

In talking to various people employed at Harvey Beef there is general agreement that the upper management's support of this initiative has been a major advantage, and having the right people encouraging others to train is also critical.

People on the plant floor see the benefits of training as: a multi-skilled workforce, improved attitudes toward the standards and a thirst for knowledge that was missing before. Tony believes:

> *Training is like a religion, when you involve people, let them know what you are doing, they take it on board and see it as a benefit to themselves and to company. Staff are also aware that they are looking after their own employability by undertaking the training offered.*

WHAT NEXT?

Training is now a part of the enterprise based agreements at Harvey Beef and is offered to all employees. Nearly all packers have commenced Certificates II. Staff have come along way in their thinking about training and have been really thrilled to know that their qualifications are recognised wherever they go at the end of the day. So, is the company concerned about staff leaving? Tony answers:

> *There are people who might be presented with a diploma in meat management at the company's expense and are then head hunted. If you train enough people you will always have a backlog of skilled and talented staff* ***so don't just train a chosen few.***

The Company has embraced the importance of training to such an extent that it is currently involved in developing the AQF 5-6 competencies for the Australian Meat Industry Training Package. This requires staff attending meetings in Sydney.

Tony constantly mentions that there has been a lot of progress but there is still 'heaps of work to do'.

In terms of recruitment the company now looks for people interest in participating in training.

Nicky indicates that the workload for the trained assessors has recently become too much and others need to be trained to handle the numbers of people going through the modules.

Perhaps the closing remark should come from Nicky who said:

> *Production lines, by their nature, are things you give and give to and some people have been doing that for over twenty five years. Staff are working hard to complete their modules but, at the end of the day, these certificates are a way of giving back.*

HARVEY NEWSAGENCY

Harvey, WA

There is nothing fancy about this country town newsagency – the skills involved in running it profitably are hardly rocket science. So the considerable amount of training and learning that bubble beneath the surface is a little surprising – and no less real just because it is mostly informal.

The Harvey Newsagency, on the main street of the small country town of Harvey, is a thriving business. A constant stream of customers comes and goes – sometimes they are 3-deep at the counter. One gentleman asks to have his 10 lottery tickets checked; a mother with young son buys a magazine and lollies; a few people queue up to place a message in the *West Australian* newspaper's death notices; one buys a sympathy card. Each day, the newsagency oversees hundreds and hundreds of such transactions.

The Harvey Newsagency is owned and managed by Mark Dennis. Two young women work there full time and there is a casual on Saturdays. Mark's wife Anky is part owner and does the bookkeeping.

It was selected as a Stage One Case Study because, on the one hand, it is typical of small retail businesses in the apparent absence and irrelevance of formal, credentialed training yet, on the other hand, Mark and his staff have established what they believe – and from the outside we felt bound to agree – is a learning culture. Of course, they did not use the term 'learning culture' and the learning involved isn't rocket science. Their tasks are more mundane than that.

As researchers, we can observe that five principal 'mechanisms' for learning are accessed by the Newsagency:

- mentoring;
- specific 'training sessions' (mostly one-offs but sometimes longer programs) organised or promoted by the Leschenault Business Enterprise Centre;
- feedback from suppliers;
- problem-solving conversations amongst Mark and the staff (and Anky);
- networking with other newsagents in the region.

But to approach this Case Study from our academic analysis of their 'learning sources' would actually misrepresent the way their learning is understood by the people involved. Mark and the others think first about what they need to know. What more might they learn which would enhance their personal contribution to - and the quality of - the business overall? With those 'needs' reasonably clear to them, they will follow through as opportunities for learning these things present themselves. There are times, of course, when 'learnings' which they hadn't anticipated become available. They grab those opportunities, too, when they can.

To show, therefore, how the Newsagency learns in context, this Case Study is presented in four sections, each about an aspect of the business Mark and the staff have learned about:

(1) establishing the newsagency;
(2) developing business skills;
(3) customer service;
(4) keeping up one's spirit.

For each of these, we have selected one learning 'mechanism'. It needs to be understood, however, that all the mechanisms can be (and have been) used in each aspect of the business – and all used in developing all the other competencies which are required for this business to run well and grow.

ESTABLISHING THE NEWSAGENCY

Mark Dennis bought the Harvey newsagency 7 years ago. He had never owned a business before – for 15 years he had been a police officer. He, and his business partner at the time, spent two years trying to learn whether this was the right investment for them. For advice, they turned first to the Newsagents' Association based in Perth. It provided a certain amount of information and, more importantly, put them in contact with other newsagents in the region.

For Mark, these other newsagents and, in particular, Peter Reuben from the very successful Collie newsagency were his key teachers. Before buying the business, he made the 45-minute trip 'up the hill' to Collie a number of times and continued to do so with Anky during their first years in the newsagency. They still consider Peter Reuben a mentor. Peter has been in the business 29 years now and, in his own words, sees himself as a 'father figure'. In the following box, Peter Reuben explains his approach to mentoring.

Learning mechanism: being mentored

Peter Reuben: owner Collie Newsagency – mentor to Mark Dennis

This industry has been good to me and I want it to be good for the others who enter it. And not just for them: newsagencies provide an important service and the whole industry needs to prosper and grow. Newsagencies in country towns are a kind of social centre – for the newsagent's family as much as for others. And that extends to a family feeling between newsagents in this region.

When people think about starting up, I suggest they come down here [to my newsagency] and work for a bit just to try it. No one has done that, but they do stop in a lot or call and ask 'what do I do about this or that?' I show them what I do. It feels great. I'm not a teacher, I could never stand up a give a speech but we talk about things. They are like my proteges. When I see Mark and the others doing well, it is very satisfying. And talking to them does help me think about how I do things.

DEVELOPING BUSINESS SKILLS

Both Mark and Peter recognise they need fresh ideas from outside the industry if they are to meet their own business ambitions. Peter solves the problem by a very active involvement in the local community. He is a past president of the local Chamber of Commerce and a member of Rotary, amongst other organisations. These connections allow him to do what in a larger enterprise would be designated environmental scanning or, more trendily, knowledge management. At a recent Rotary meeting, for example, the Perth lawyer who is developing a big marron farm near-by described the way the marron, fish-farming and tourism businesses might grow in Collie and how he rated the current local services. This is vital information and these meetings provide a 'learning space' for Peter.

Mark is more conscious of needing fresh business skills (as distinct from business intelligence). Over the last few years he has obtained his 'fresh input' by attending seminars on business development (eg, on writing a business plan) offered through the Leschenault Business Enterprise Centre which is managed by Alison Lannin. But it is important to note that Mark is a relatively recent participant in these programs. He had the newsagency for several years before he attended his first seminar. His involvement came about when he noticed a BEC competition, advertised in the local paper, to win some free training. Mark filled in the entry forms (simply his name, business, contact number) and won.

The fact that Mark had not previously attended a formal training program is hardly surprising. In addition to being at the shop all day, he operates the newspaper delivery service. This means he actually starts work at 3:30 every morning. By the time he locks the newsagency door it is 6:00 pm. The BEC courses are held in Bunbury which is a good half hour drive away. So on the evenings he goes to a session, he is lucky to be home and in bed before 11: a nineteen-and-half-hour day. And he has to be up again and lively four and a half hours later … in the dark.

Lannin's approach to training programs for small business owners in the region is thoughtful, insightful and contributes in no small measure to the successful learning of people like Mark. In the following box she explains her approach to providing programs for small businesses like the Harvey Newsagency.

Learning mechanism: attending informal (non-credentialed) seminars and courses

Alison Lannin: manager of Leschenault Business Enterprise Centre

It is the BEC's courses which Mark Dennis has found the most helpful.

We are of value to local business for one simple reason: WE DO NOT WASTE THEIR TIME. I cannot repeat this too often: WE DO NOT WASTE THEIR TIME.

Our ways of ensuring we don't waste their time include:

- I'll never put on a course unless I've heard the presenter. Lot's of people come to my door peddling training programs. We turn away 9 out of 10. Furthermore, I will only recommend a course to a particular individual if I know he/she can profit from it.
- We find out what individual businesses need. One way of finding out that has worked for us is that I encourage them to apply for awards. By going through the criteria together, we can see their strengths and where the gaps are. But it's never threatening, I'll just say about the award: 'you start, I'll help'. By the way, we have won 1/3 of WA's small business awards even though we have only 8 per cent of the state's small businesses. We also hand deliver 800 of our newsletters which gives us a good chance to chat with our clients – just a word from them here or there can be helpful to us.
- Seminars and courses don't have to be huge. These small business people are entrepreneurial and motivated so you only need to take them a little bit further for a big leap to occur.

CUSTOMER SERVICE

Short courses on customer service are available at relatively modest cost. Mark has paid for his two full-time employees, Sheree and Alana, to attend a few of these. Part of his motivation is, obviously, for the technical skills the young women will acquire. But he also recognises the opportunity these courses afford to facilitate the conversation back on the shop floor between him and Sheree and Alana. For example, shortly after Alana joined the newsagency last year, she and Sheree went to a session on building good customer relationships. As Sheree described it:

> *It was on answering telephones, greeting customers, learning to never complain in front of customers - that sort of thing. I knew all that from my six years working in the pharmacy as well as the year with Mark, but it was a way of helping Alana.*

Similarly, when Sheree went to a more advanced course on conversing with customers, Mark accompanied her.

Learning mechanism: problem-solving on-the-job

Mark, Sheree and Alana 'at work – at talk' in the Harvey Newsagency

When things (infrequently) go amiss, they tell and retell what happened. When a customer becomes angry, or another rude, or kids try to steal something, they will analyse it in detail and repeatedly. An incident that preys on them still is how one customer responded when his child broke an object and he was asked to pay for it.

Both Sheree and Alana report that when they get a chance to meet girls from other newsagencies, one of the main topics of discussion is 'difficult customers and difficult incidents – and how good it is to find out you are not the only country town with problem customers'. Mark also thinks long and hard about how he, and the others, handle uncomfortable situations. This kind of learning is almost a boot-strapping operation. By pooling and 'chewing over' their thoughts and concerns, they draw out for themselves the lessons to be learned.

KEEPING UP ONE'S SPIRIT

Operating the Harvey newsagency and the paper delivery round is hard work. And, like so many small businesses, it is financially stressful – literally being the 'meat in the sandwich' between suppliers (and their demands) and customers (and their demands) *and* the bank (and its demands). While Mark's business is doing well, things still go wrong from time to time and there are no long-term guarantees. As he states matter-of-factly, 'it is hard to be resilient'. What makes it all worthwhile?

> *What makes all this worthwhile? It's part of building up the business. You have to grit your teeth and look at the bigger picture. Otherwise you would give up. I'm working too hard. I had pneumonia 18 months ago and I'm not properly recovered from that. I don't see my lovely kids as much as I want. My wage has been peanuts for years. But Anky and I have a ten year plan to build this up and move on to a bigger newsagency. We've gone without to do that. That's what makes it worthwhile. And, well, something else, too. I like this work – not delivering papers, but the shop, yes.'*

In the circumstance, Mark Dennis and people like him need all the support they can get. Networks of colleagues are one of the surest avenues for developing resilience and learning to cope with the stresses of business. Mark is not an aggressive networker. He is not one of those people who seem to know 'everyone'. It is the relatively small network of neighbouring newsagents which Mark most relies on. That network delivers important learning. Many examples of specific 'learnings' which the newsagency has acquired from this network surfaced during the case study, but one important underpinning aspect was the way all these 'learnings' delivered a measure of confidence and resilience for the Harvey newsagency:

Learning mechanism: networking with other newsagents

Newsagencies are subject to quite severe pressure from suppliers. 'Magazine suppliers, for example, can send you broke – you have to be very tough with them', is how one newsagent describes it. Card companies, too, have their own interests which may not wholly coincide with the newsagent's. Sales reps come to the door constantly with their toys, their gift items, their books.

Learning from newsagent colleagues about ways to deal with the magazine supply issue was an important help for Mark. But so too was the apparently more mundane example of Dot, who runs the newsagency in Waroona (20 km up the road), when she called Mark to tell him that a line of toys she had just started stocking was doing really well, and he ought to try it. Indeed, one of the greatest frustrations both Mark and Peter Reuben, the Collie newsagent, feel is when they try to offer advice to other businesses in their town and are ignored or, worse, when they feel inhibited from even trying to offer help.

CONCLUDING COMMENT

A small business like the Harvey Newsagency is not subject – at least not in any easily recognisable form – to the profound changes in the global economy and technology which tend to be driving the thrust for training/learning elsewhere in Australian industry (and internationally).

Indeed, in one sense there does not appear to be a lot to learn in running a newsagency and the changes newsagents like Mark or Peter Reuben might want to introduce are not the stuff of Nobel Prizes. Nonetheless, these businesses intend to be dynamic, to try different things - they are not interested in merely pottering along. They may not be leaping forward - there does not appear to be much leaping to be done in this industry, at least not so far as these newsagents can tell - but they do want to move forward. They want to learn. And they have found a myriad of ways to do so.

O'REILLY'S RAINFOREST GUESTHOUSE

Lamington National Park, Qld

> This quiet mountain retreat is expanding in several new business directions. While the opportunities are impressive, so too are the dilemmas which the change is generating. Training and learning - in some innovative forms - are being called on to resolve the issues.

O'Reilly's Rainforest Guesthouse is a family owned and operated business which has been going since 1926. It is located in the middle of Lamington National Park in Queensland some 150 kms southwest of Brisbane. O'Reilly's motto is *'Where strangers are treated as friends, friends as family, and family as gold.'* This has not been a recent imposition, but is a sincerely held, long-standing belief which all staff are expected to understand and implement. It permeates all that they do - but it's out of this that some of their most pressing business issues arise.

O'Reilly's not only runs the Guesthouse but also Gran O'Reilly's Store and Bistro (on-site) and Canungra Vineyards, situated some 25 kms away and down the mountain. Much of this additional enterprise is new:

- the Store was part of the original buildings but has had the Bistro added in recent years with a view to catering for more of the day tour market which often runs to hundreds of people at a time;
- the Vineyard was established two years ago after the purchase of an old house, now refurbished, and the accompanying property that has been planted with vines from which the first wines have just been produced. It has its own restaurant on-site;
- there is a hope that people visiting the Vineyards will add a short or long visit to the Guesthouse to their travel agenda but, at present they seem to be catering for different markets;
- the Guesthouse itself has recently been expanded at a cost of some $5 million to accommodate up to 180 guests at a time.

In fact, that is O'Reilly's basic business dilemma. It essentially has three different markets.

There is their original one which consists almost exclusively of return business from people seeking a quiet retreat in traditional guesthouse style. Many guests have been coming regularly for 20 or more years. Some are now bringing their grandchildren. To accommodate the'quiet retreat' approach, the new rooms they have built have no telephones, no televisions and no radios, though they do have tea and coffee making facilities. Each guest or family is taken to their rooms by a porter who explains all the features of the room and the Guesthouse generally. To help to keep the 'homely' atmosphere of an old fashioned guesthouse Dining Room Hostesses seat guests at largish tables for meals and individually introduce the guests to each other. Great stress is placed on staff remembering people's names and using them. (Courses are regularly held for staff to help them develop this skill.) During dinner, Tim O'Reilly or another guide will come around to each table to talk about the planned activities for the evening and the next day.

A newer market is the corporate one. O'Reilly's is increasingly being used as a base for shorter and longer term professional development and other business planning and development activities. This clientele is very different to their traditional guesthouse folk who return year after year. The unhurried, leisurely atmosphere created for these people does not sit comfortably with business people who are accustomed to and expect a much brisker pace. This provides some challenges for staff in meeting the needs of both groups. To this end a recent shift to more in-house training has been significant. Generalised, external training doesn't usually cover such complexities.

The third and growing market is the day trippers who are generally from overseas and often non-English speaking. How to meld the day-trip 'visitors' with their other 'guests' is an on-going challenge. Originally, the Bistro was added to Grans as a way of 'feeding' the day-trippers, but recently they've been experimenting again with having some at least in the Guesthouse Dining Room as in theory, this is a more economical when preparing food, but there continues to be some ambivalence amongst staff as to the benefits of this move.

What has always distinguished O'Reilly's is its 'culture' – and the fundamental question now is how to maintain a long-standing, unique culture which is valued by customers and staff alike while converting a family business run almost exclusively by family members into a corporate entity with outsiders on the board of directors *and* dealing with the business issues of combining geographically separate and different styles of operations, absorbing new and different markets, and so on.

Training is seen as an important strategy for dealing with many of them - from the Board through to the kitchen and the store because everyone now – including family – is expected to compete on an equal footing with any other applicants for any available positions. At the management level, for example, this works as Matthew Perry, O'Reilly's general manager, explained:

> *Every senior manager has the opportunity for support to do further education and a number take that up. They are also encouraged to become members of the Executive Round Table and other professional support groups. If the company sponsors them, however, there is the expectation the company will get something back from that. As long as you put your case that the skills will be beneficial and you put time back into the company, you will get support. Ownership and commitment is important.*

BASIC TRAINING

The Staff Handbook is explicit in stating that:

> *O'Reilly's believes to reach their goals, the organisation needs to have well trained and experienced staff. It is our commitment to develop all employees to their potential in order to improve job performance and satisfaction.*

Basic training therefore is provided for every employee when they start there which involves a structured program of progressing through a series of job tasks. Initially this is done through an induction into O'Reilly's with their immediate supervisor. There is an expectation that staff will achieve basic competencies within the three-month probationary period. From then on there are regular performance reviews for each staff member. From the very first staff are being guided and supported in a very personal one-to-one manner.

This one-to-one training is not only done formally, however. As one staff person described it:

> *When you first start out in a new department you work with another person. You follow the manual and the checklists. There's always too much to learn in just a few days but everyone is always very helpful. You're encouraged to ask questions. You're not on your own at all. Supervisors are constantly asking you for your opinions. You're known by management, by everyone. You're made to feel welcome. If you don't ask you are left out in the cold.*

Shane O'Reilly, the current Managing Director, is a strong advocate of structured training. One of his seminal experiences was working in the hospitality industry in South Africa. Because they were working there with people who did not share a common understanding of such apparently simple (but culturally bound) matters as the use of the cutlery on a table, which, as he pointed out 'can be laid in an extraordinary variety of ways', they found it necessary to have very explicit and complete training manuals for all tasks. With these written it is always possible for a person having trouble with a task to go (or be sent) back to the manual to see exactly what the procedure was without constant and/or aggressive reiterations from supervising staff. He introduced similar manuals to O'Reilly's.

The Food and Beverage Supervisor described how she uses the Manuals.

> *The Training Manuals' procedure is one in which you encourage staff to read them, to have a play (this checks the effectiveness of the Manual); then there's discussion, questions and finally the assessment (using a manual). When they've done all that, they get a certificate. Staff manuals should be the first point of reference for any staff member.*

She's now looking at ways she can improve them, by adding photographs and more diagrams. She tries to spend one day a month in the office updating procedures/manuals.

One issue with Training Manuals, identified by some staff, is keeping them up to date. If they are not, they will not be used. Every time the Manuals are updated the accompanying checklists, which people work from on a daily basis, must also be updated. While some people saw the Training Manuals as unnecessarily cumbersome, others saw them as gentle, non-punitive ways of helping staff to know what is expected of them and an easy way to correct any mistakes. There is also a difference in the acceptance of the manuals in different arms of the business: staff and management at the Guesthouse seem to use them effectively while staff at the Bistro are less enthusiastic.

MULTI-SKILLING

Strong emphasis is placed on multi-skilling at O'Reilly's. There are several reasons for this. The most obvious is the fact that in a geographically remote location where most staff live on-site it makes economic sense to have staff who can fill a variety of roles. In times of high demand in one area, or a shortage in another because of, say, sickness, having staff who can readily turn their hand to the jobs in other areas has been much easier than trying to bring in relief staff. During their time there, all staff are encouraged to try out other areas, even those on traineeships, and all staff I spoke with had taken the opportunity to extend their experience and skills in this way. But, as the Food and Beverage Supervisor put it:

> *It's not that staff have to be multi-skilled at O'Reilly's. Some don't want to be - they find it easier to stay in just one role. But many staff enjoy being multi-skilled as it offers them a variety of duties throughout their day. The only problem with multi-skilling is that people don't always get to know one role in depth. Certainly, the check-lists have to be really up to date [to enable staff to check for themselves what is required in any particular role].*

IN-HOUSE AND OUT-SOURCED TRAINING

In addition to the informal (but not accidental) in-house training done at O'Reilly's, a considerable amount of formal training is undertaken at all levels of the organisation Indeed, it is recognised that people, even family are not likely to spend their entire lives at O'Reilly's. Portability of training, which is one of the assets of a formal qualification, is seen as important.

In the past, most of the formal training has, by necessity been provided by people external to the organisation but with the advent of Training Packages and increasing diversity in training providers it possible to do a great more internally. Mary O'Reilly, the Human Resources Manager, has recognised that they need to have criteria in choosing the RTOs they work with – not all RTOs are equally good.

O'Reilly's has continued to take on apprentices (especially as chefs) and in the traineeship field there has recently been a front-of-house trainee and several people doing computer traineeships using self-paced modules. Who they bring in for traineeships and apprenticeships depends somewhat on the trades people they have on staff at any given time. Chefs, for example, often have their own particular ideas about what level and how many apprentices they will take, but management believes that they do need a blend of different years. Traineeships have proved to be particularly successful with several staff, because of the combination of theory and practice while they are also being paid for it. While the computer literacy traineeships really produced results, they required significant commitment from the staff who undertook them.

An interesting perspective, however, was offered by the Front Office Trainee who'd just completed his training. He felt:

> *The training on-the-job by Cathy [his supervisor], however, has been the most beneficial. I wasn't learning anything new in the modules – just being able to put things down on paper in words. I got much more from having Cathy looking over my shoulder.*

Increasingly, once they have tried some particular type of training they will take the modules they see as most appropriate, use their own staff to adapt them for their own purposes and then apply through Tourism Training Queensland for certification. This enables them to customise their own training and target it to their very specific needs. As Matt Perry, their General Manager says, he likes 'to pick the eyes out' of the courses.

At other levels, supervisors are using the Training Packages to structure their own training for their staff. While this was clearly endorsed by staff at the senior level, in talking with other staff, it became clear that many of them also see some value in having access to external training, in such areas as Workplace Health and Safety and even in such general areas as Wine Appreciation.

PERFORMANCE REVIEWS AS AN INTEGRAL PART OF TRAINING

Performance management is a very important part of the training process at O'Reilly's. Plans are up drawn every twelve months and goals are reviewed every six months. These are done one-on-one with the immediate supervisor. The working sheet has a section for further skills development or training. If they are seen to be of benefit to the company then financial or time support will be provided. If not, the company will facilitate it but not pay. Everyone is expected to use their initiative and seek out their own opportunities. It is always looked on as involvement. If the employee has interest and motivation then help will be provided.

Again, there is an issue of time as Performance Reviews need to be done regularly to be effective, not just at the formal planning review at six-monthly intervals. Nevertheless, Shane O'Reilly is committed to them and has been very much the driving force behind their implementation, although he is adamant that training now rest with the General Manager and the Human Resources Manager. He too sees them as a training tool, not just because each staff person's needs for further formal training are discussed at this point, but also because they are seen as an integral part of their development plan. The Performance Review provides opportunities for employees to discuss where else in the business they want to work and what plans they might have for promotion. Shane has been instrumental in devising these and insisting on their use despite the fact that are very time consuming. He has no doubts about their value.

COMMUNICATION

Communication is a key element in ensuring that the training which percolates throughout O'Reilly's delivers maximum benefits to the individuals and to the business. O'Reilly's prides itself on its communication with staff and guests alike. One telling example is that a senior manager always sits at the bar for an hour or so each night to talk casually with whoever comes along – staff or client – about 'how things are going'. The Managing Director cooks toast each morning in the dining room to talk to clients about their experiences at the Guesthouse.

The Food and Beverage Supervisor, who also lives on site, encourages 'good gossip' amongst staff as a way of recognising that gossip is inevitable but that it can be positive or negative in its intent and its effects.

More formal communication with staff takes essentially three forms, all of which are an integral part of their training strategy. These three are meetings, one-to-one coaching/mentoring and detailed written training manuals and checklists.

There is a range of meetings of different sorts between different groups of staff. The executive management team meets weekly. Supervisors meet once a week with the General Manager. Department supervisors meet every two weeks with their staff. There's also the Consultative Committee which is made up of representatives from each department who meet with the Human Resources Manager and the General Manager. This latter is a forum for raising issues, arranging functions and making staff awards from nominations by peers. They also meet every two weeks.

One of the most remarkable things about O'Reilly's is that the traditional guesthouse approach appears to happen effortlessly but an immense amount of thought, planning and skilling has gone into it. Similarly, while it appears to be so stable and long-standing, it is actually subtly adapting and changing. New ideas and ways are tried. Staff are encouraged to contribute to all of this.

CONCLUDING COMMENT

Five aspects of training and learning at O'Reilly's generate a culture which contributes to the benefits the enterprise gets from its training/learning efforts:

- There is a very definite emphasis on training throughout the organisation at all levels. This is explicitly stated and physical and financial support is provided for it.

- There is also a great amount of informal learning evident throughout the organisation though there does seem to be a certain ambivalence as to its value.

- There is a recognition that change is an integral part of survival in an increasingly competitive world. Training is seen as having an important part to play in that change whether it be in helping directors of the company to do their job better, ensuring that front office staff have up-to-date computer skills, or enabling floor staff to memorise names of the customers.

- Training itself is constantly under review. There is a conscious effort to determine what works best for whom and under what circumstances. Everyone has a part to play in this including those receiving the training.

- Finally, there is a recognition that what counts most in successfully incorporating people into the O'Reilly's 'family' or culture is attitude. There is a strong belief that skills can always be taught, but if people don't have the 'right' attitude, they won't last there. Virtually every person, including guests, who was interviewed stressed the importance of this.

PRETZEL LOGIC

Perth, WA

This rapidly growing web design company is a buzzing, dynamic place. It defies all the usual rules about companies that benefit from training and learning: it absolutely cannot find the time for formal training; what is prized knowledge one day is worthless the next; it expects to loose the talent it skills. Yet this enterprise can only be described as having a thriving learning culture.

Pretzel Logic began in January 1992 with Steve and Valerie Pretzel. They started the web design business in 1995 - a totally new industry, as well as a new business. When they began web design there was just the two of them. In April 2000 there are over 50 employees and they are growing almost weekly.

Until recently expansion has been totally funded by growth in business, though they are now looking at taking on new partners to inject venture capital and add different people to the company's board. They have had offers of takeovers in the past, but so far have resisted all comers. Nor have they sought to take over other companies, aware as they are of the difficulties of merging cultures. Almost all of their recruits to the business are new graduates from university or TAFE - or in some cases, self taught. As the business has grown they have now become aware of the need to introduce some people who have the skills to manage a larger organisation at both board and 'shop-floor' level. As Steve Pretzel put it: We need to employ more grown ups'.

The following information is grouped into four sections for ease of discussion:

- getting ahead, staying ahead;
- quality control;
- turning individual learning into organisational learning;
- a learning culture.

However, it is essential to realise that at Pretzel Logic these things do not operate independently – all are interlinked. In the offices and amongst the staff there is a constant buzz and excitement. What is dominant one day may not be the next. This, in essence, is one of the primary dilemmas with which they wrestle - how to maintain that energy, excitement and quest for growth and change, while at the same time exerting enough control to have everyone going in more or less the same direction and not have the entire organisation implode.

GETTING AHEAD - AND STAYING AHEAD

Pretzel Logic has no peer in WA – and is rapidly developing an internationl reputation as well. This presents them with a crucial challenge – having got ahead, how to stay there?

Capital creation

Growth in demand has not been able to fund capital growth indefinitely in today's markets and so one of their latest moves is to look at bringing in venture capital and with it, new directors to grow the company. Exactly what effect this will have remains to be seen, but it would be naïve (and they are definitely not that) to assume that nothing will change. At the very least, there will be the need to respond to a different group of decision makers, who will be setting directions which may not necessarily be in accord with where staff might wish to go. These decisions may be made by people who are viewing the company from the outside and the market place, rather than from the inside and the product base. There will be a different set of imperatives to drive them.

The establishment of T3

T3 is a group of employees which has been established to research new technologies and to look at how these technologies might be integrated into the organisation. It is essentially a research and development group as it also has the responsibility for developing systems and processes that enable corporate knowledge to be recorded and reused in future projects. Until recently research was a relatively ad hoc affair. This group has been established to bring more discipline to the company's research. Whether it will also restrain some of its creativity has yet to be seen but this is a concern for their young, vibrant and energetic staff.

Communication

Communication is fundamental to the way in which they operate at Pretzel Logic - between team members, between project managers and clients, between professional peers e.g. programmers or designers, between Valerie and Steve and everyone else. As they have grown this has become increasingly difficult and gradually they have recognised that some of it, at least, needs to be systematised.

People at Pretzel Logic work in teams pooling the skills of programmers, graphic designers and new media developers, and sometimes consultants of various sorts, all held together by project managers and project coordinators (the latter are learning and practising to become project managers). The teams are changed with each new project. But their seating is arranged in groups of similar professionals which cut across different teams. There are weekly meetings amongst the project managers. The whole company meets together on Monday mornings. The PVC (Pretzel Logic Virtual Campus) which began as lunch time meetings (and still continue) is now being extended into an intranet facility to enhance communication. All of this contributes to a great deal of flexibility amongst staff and a sense of connection with many people. With the increase in size they are now looking at a more formalised induction program to ensure that new staff are rapidly absorbed into the company.

QUALITY CONTROL

This dilemma is how to maintain the quality of Pretzel Logic products, and their reputation in this area, when bringing in new people with their own ideas, values and perspectives.

Accountability

In some respects quality control (or assurance) is an issue of accountability – and that is certainly how some of the staff now see it. Who is to have authority over whom and for what aspects of their work? For an organisation which is built on a very flat structure with a great sense of loyalty and corporate identity this is not easy to orchestrate. There is no doubt however that it is something which people at various levels are realising has to be discussed and structures put in place if quality is to be maintained. Thus, PPP (Pretzel Procedures and Processes) is an attempt to develop a data base, to document and systematise the 'way things are done' at Pretzel Logic.

There is also the issue familiar in many organisations as to what sort of skills people with supervision responsibilities need to have. At Pretzel Logic project managers don't necessarily have technical skills, but without them it's hard for them to provide the necessary quality assurance. The PPP has been designed to try to address this, but it's early days yet to see whether this formalised process will effectively address this issue. In the meantime, the project managers themselves seem very aware that 'the buck stops with them' while some of the others are not so sure that project managers are sufficiently skilled to know what is working effectively and what isn't. They are concerned that shoddy work may get through, only to be picked by the client when something doesn't work - and that will reflect badly on all their workmanship of which they are all, so rightly, proud.

Informality – people to resources rather than vice versa

Up until now the organisation has been not only very flat – but also organised in a very informal (even loose) way. People dress casually. Dogs have been allowed into the workplace. People can bring their babies if they need to. They largely come and go as they please. Others have arrangements to work from home at times. If and how such informality can continue while at the same time maintaining quality as the organisation grows and expands is a challenge they are now confronting. Already in the move to new premises other tenants complained about the presence of a dog - so the dog has gone. One question which people seem to be asking themselves is, what else is also going to have to go – why and how?

TURNING INDIVIDUAL LEARNING INTO ORGANISATIONAL LEARNING

This is probably the biggest dilemma they do and have always faced. It is certainly one which Valerie is acutely aware of – and concerned about. Everyone at Pretzel Logic seems to be aware of their own learning, but there were perceptible differences between those who firmly believed that 'if the individual learns, so does the organisation' - and those who felt that a more cohesive effort would need to be made if all the learning done by individuals was to be turned into organisational learning. The T3 group, the PPP and the PVC are some of the structures that have now been put in place to address this.

Motivation for learning

From those we interviewed the strongest motivation people at Pretzel Logic had for learning was their own strong desire to grow and develop their knowledge, skills and understandings about their chosen areas of expertise - though often also about others as well. Additional motivation resulted from the need to keep abreast with the pace of change in the industry: if learning was not ongoing people in the industry quickly lost touch with new approaches to web development. They were a remarkably reflective group of people by any standards who could articulate very clearly how and why they learned. They were also very aware, however, of how the organisation supported them in that. The acquisition of support materials, the encouragement to question each other, the capacity to work in teams, the opportunity to work on new products, the support for them to share their knowledge and skills with others, all contributed to a sense of their own learning being valued and encouraged.

A drive to 'teach' other people to do your things

There was a noticeable feeling amongst several of the people we spoke to of a need to share what they learned with others. For some it was even a need to pass it on so they themselves could have room to learn and do new things. This creates an extraordinary dynamic in an organisation. Where it seems that retained knowledge in some organisations is power, at Pretzel Logic sharing knowledge is power. As Michael Pearson, a Project Manager, put it: 'Power at Pretzel lies in not retaining information but in passing it on to others so that you have the time to then learn more and to work in new fields'.

Recruitment and retention of people

Most companies recognise the costs of losing and replacing staff and Pretzel Logic is no different. And yet they also appreciate the nature of the people who they recruit. The staff at Pretzel Logic are young by any standards – on average about 23 or 24. They are individually and collectively ahead of most others in the field, especially in WA. Most of them want to further their experience elsewhere in Australia or overseas and most have never worked in another company. Thus, there is a tension between the understanding of the need for these people to grow (which is what brought them there and why they were recruited in the first place) and the desire to retain them and their skills – while at the same time knowing that their very strengths are what will take them away. There is little that Pretzel Logic can do about this beyond accepting that this a reality for their particular business.

Reflection and evaluation time

A refrain from many of the staff was how to build in reflection and evaluation time when new work is always there demanding to be done. There was also, however, some uncertainty as to whether there was enough similarity amongst projects for there to be very much carry over. Nevertheless, most sensed that the frantic pace at which they work doesn't allow them time at the end of a project, as a group, to think about what they had done, consider any mistakes that might have been made and decide if there were lessons which need to be remembered for the next time around or which should be shared with others. Thus, while some were aware of trying 'not to re-invent the wheel' or to 'learn from others mistakes' it seems that when this happens it is more by chance than by design.

A LEARNING CULTURE

Sharing of knowledge and skills

Many staff members told us about the way in which they share everything that everyone knows - with anyone else at all levels. There is no sense of protecting one's knowledge or skills from others. Sharing is also evident in the brainstorming, a regular means of addressing problems and issues. It is a strategy for drawing on everyone's knowledge and understandings.

Support for learning

- There is great support for the range of different ways and styles in which people learn: informally from each other by asking and answering questions;
- formally from each other by talks and meetings;
- from books and journals;
- from 'playing on the www';
- through trial and error;
- through 'jumping in' or 'being thrown in' at 'the deep end' i.e. being encouraged to take on something outside of one's comfort zone.

As Michael Pearson, one of the Project Managers explained:

> *Generally people don't go on courses here. You develop from your existing skill sets and attempt to learn from everything you do … We are always looking for the easiest way to do things – it's efficient.*

Students

Taking students on work experience has become a 'tradition' in the relatively short time in which they have operated. Not only does it provide students with an opportunity to work but it provides the company with an opportunity to see at close range the attitudes and approaches of a potential employee and assess whether or not they will fit into the Pretzel Logic culture. Pretzel Logic's sees young people as a resource ready to grow and develop with the company.

Risk taking

The climate is one of encouraging people to have a go, to take risks – without fear of retribution (though not without recognition of consequences, for themselves and the business). There is an overt sense of confidence and trust in the employees and in their competence and capacities.

Encouragement of self-learning

Encouragement of self-learning, by which they seem to mean taking responsibility for one's own learning, taking risks in learning, asking questions, seeking out new knowledge and skills and not expecting others to direct you, is something that many of the interviewees identified as being encouraged at Pretzel Logic. An expectation that people will learn – that because the industry itself is growing so fast, that you will seek out and find new ways in which to do things – and that there will not necessarily be someone else, internally or externally, who can teach you. Some expressed some wearying at this, but mostly people were excited and energised by this need. Virtually all recognised the necessity and commented on it.

Assessing learning

How, in fact, does one know if one's employees are learning? Valerie Pretzel has adopted a relatively simple and straightforward rule of thumb. She looks at the way in which people change from when they start to where they are now.

The people themselves were also very aware of how much they had learnt since coming to Pretzel Logic. Indeed, there was only one employee we spoke to who didn't say that most of what they knew they had learned since coming there. In part, this is to do with the nature of the industry. It is very new and so there are not people around with the knowledge and skills to formally pass on to others. Several employees pointed out that what they had learned in their first year or two at university or TAFE was out of date by the time they graduated. Some 20 years ago, computer programming generally was like this. Today there are a vast number of people able to teach others the basic skills of how to write programs. Now it's the more advanced and continuously growing new media skills that are in short supply.

But at Pretzel Logic, it is also partly to do with the company itself and its culture. People there know they are learning and they know that they are encouraged to learn – and all seemed well pleased by that. It is even one of those things that is looked for when employing people and the job section of their web-site is full of references to the opportunities there are for employees to learn and the expectation that they will. As the production controller, who participates in the selection of staff for her section, said:

> *Everyone is interviewed to see what sort of person they are, and their attitude to work and to the industry. We look for people who are keen to develop their skills, enjoy what they're doing and willing to help each other. Experience is a bonus.*

In a formal sense, reviewing people's own plans and goals with them is a way of assessing the learning that is taking place. It seems that this was a more regular occurrence but that with recent rapid growth has become less common. The appointment of a specific Human Resources Manager may mean that this procedure will be resumed.

Pretzel Logic is a new, young company growing and expanding at a phenomenal rate. It seems to have already developed a unique and exciting learning culture. It will be fascinating to see the way in which grows and develops in the future.

ST JOHN OF GOD HOSPITAL

Subiaco, WA

St John of God Hospital has an enviable reputation amongst its patients and employees as a 'good' and caring place despite the fact that it faces the same horrendous financial and other pressures as every other Australian hospital. The way it develops and uses the skills of its workforce play a key role.

The St John of God Hospital (SJOGH) in Subiaco is one of eight private hospitals nationally within the St John of God Health Care Group. For more than a century the St John of God sisters have provided ministry to the sick and needy, in their hospitals and through community health and education projects. Although the sisters have recently handed over administrative responsibility to broadly constituted Boards and lay administrators, their heritage is directly reflected in the Mission statement and core values of the hospital - displayed and quoted everywhere - Hospitality, Compassion, Respect, Excellence and Justice.

What is there is to learn about training and learning culture in a modern hospital? Hospitals, of course, are not just staffed by doctors and nurses. Orderlies, nursing assistants, ward clerks, administrative staff, cleaners, technicians, gardeners, laundry and kitchen staff are integral to the effective functioning of the modern hospital. Their learning needs, long overlooked, are now an integral part of a hospital's total quality management.

St John of God Hospital Subiaco was also of interest to this project because it is intent on investing in its staff, and last year was recognised for its achievements in this area. We were therefore curious to examine what made this hospital stand out and to see how it functioned as an enterprise alongside other businesses developing their staff and training/learning culture.

We have chosen to illustrate the training/learning culture of this organisation through five vignettes. The vignettes were selected to illustrate how, in a busy organisation, one can achieve skills and organisational changes using both informal and formal programs, while also maintaining and strengthening the central values base.

MAKING THE MOST OF AVAILABLE MOMENTS

> *That should assure us of at least 45 minutes of undisturbed privacy.* (Dorothy Parker - upon pressing her bedside nurse's bell)

Although we appreciate the humour of this quote, we also recognise that hospital wards are busy places. So cost conscious have hospitals had to become, that they now tailor their staffing according to the number of new admissions and bed load demands. When admissions are down and bed demand is lower, fewer staff will be needed and staff may either be sent home or fewer casual staff will be called in. So when ward staff are scheduled to attend a workshop, demonstration or training session, the load on other staff temporarily increases. Under these circumstances how do you ensure maximum advantage from the training being offered?

Teaching, of course, is one of the most effective ways of reinforcing learning. When teaching peers, especially through demonstration, we rehearse, supervise, give specific feedback and take responsibility for the quality of the outcome. When learning can be done in smaller, more frequent sessions - distributed learning - it is often more effective. So why not do it this way when you can?

Because the ward context is not uniformly busy through each shift, there appear 'windows of opportunity' when peer training can occur. Patient rest time or visiting hours came to mind. Keeping a skeleton staff to monitor and respond during these times while other staff give and receive short training sessions means that more staff get the benefit of the training that one person initially received. Staff commented:

> *Going to a session and knowing that you have responsibility for teaching it to your peers certainly makes you attend much more directly to what is being taught, to ask questions and to take good notes and diagrams so you can demonstrate skills with confidence. My learning is much more thorough this way.*

MISSION MENTORING

> *You must constantly ask yourself these questions: Who am I around? What are they doing to me? What have they got me reading? What have they got me saying? Where do they have me going? What do they have me thinking? And most important, what do they have me becoming? Then ask yourself the big question: Is that okay?* (E James Rohn *The Treasury of Quotes*)

At this time of transition from an 'Order-based' organisation to one of lay administration, there is active attention to transmitting and living the values that underlie the St John's Order. One means of attending to the process of continuity is through 'mission mentoring'. This is an active program within SJOG where selected individuals are identified to participate in a year-long program involving an aspect of pastoral care in the organisation. The participants must commit themselves over 12 months to five days of formal program and to undertake a project of benefit to the organisation as a whole. Since the program involves people across the organisation, it assists people to meet and work with different colleagues throughout the hospital.

In 1999 participants addressed the role of working with volunteers - a dedicated, important but often forgotten group within the hospital. The focus group discussions with volunteers during morning teas, resulted in many small but significant changes being made. Volunteers came to be recognised as employees - albeit unpaid ones - who deserved the same treatment and recognition as paid employees. As a result of this project volunteers' parking needs and parking payments were looked at; scissors and secateurs provided for them to do the flowers; and long-service awards introduced with an annual formal recognition ceremony.

For Chris Nicholls, Coordinator Admissions and Clerical Services, the opportunity to be part of the mission mentoring program provided opportunities to meet staff whom she would ordinarily never encounter. She also became more familiar with the meaning of 'living the values of the hospital'. While orientation gives staff the history of the order and its hospital work, mission mentoring made the values real.

> *Although you see people around the hospital and know their faces, this program gave me the chance to get to know the members of the group as friends and colleagues. I enjoyed this experience because I could see how important my part was in the whole process of someone coming to the hospital. It wasn't just admitting them. I set the*

> *scene for what followed and my part was, in its own small way, as important as the treatment that followed.*
>
> *Although in my ordinary day-to-day work I don't have much contact with volunteers, I came to appreciate the work they did. Now I greet them as I would any other worker in the hospital and respect their commitment to the hospital. While it wasn't easy to find a common project to work on that would make our hospital a better place for everyone, once we had decided on finding out what we could do for our volunteers, we became committed to one another and to them.*

FORMAL AND INFORMAL LEARNING OPPORTUNITIES

> *The information presented in the most striking circumstance is the information people remember longest.* (Aristotle)

The appointment of Angela Williamson to the Education and Teaching unit was seen positively, especially by the non-clinical staff for whom there had been more limited learning opportunities. The non-clinical staff (such as orderlies, cleaners, laundry and kitchen workers and ward assistants) have a view that there is a hierarchical approach taken to training, that training is provided to clinical areas first and then if there is enough funding they may receive some. They were also well aware of the differential costs of clinical courses and sceptical that attention would be paid to non-clinical staff.

Williamson is determined to change that scepticism:

> *Our orientation program is one of the most important staff development activities in our organisation. Through it we aim to imbue staff with a shared sense of mission and purpose in St John of God Hospital and their role in maintaining the tradition.*
>
> *It could be relatively easy to do repair work with the non-clinical staff who may behave in ways which are not congruent with the mission and values. What it requires is willingness on the part of departmental managers who may not always see the need, especially if the priority right now is to attend to something within their area. It is always easy to find an excuse not to do this part of the work. But it is fundamental to who and what we are.*

One ward clerk commented on the real advantage for people in non-clinical positions to have training in medical terminology. Too often they were dealing with members of the public and clinical staff and didn't understand what was being said to them. With some basic foundation they are able to deliver better service because they 'understand the language'. They valued the introduction of these courses alongside the traditional occupational health and safety ones.

One non-clinical staff member noted:

> *Sometimes I feel like an airline hostess, presenting the public face of the organisation but not knowing enough to respond effectively. Understanding even a little bit of the language, you feel more a part of the place.*

Many staff said that they learned mostly by observing, from their mistakes and from each other. Those who work in the wards also get feedback from patients and this helps build their self-esteem, especially when they are complemented for their attitude, care and skill.

BRING A CAKE!

> *The range of what we think and do is limited by what we fail to notice. And because we fail to notice that we fail to notice, there is little we can do to change; until we notice how failing to notice shapes our thoughts and deeds.* (Ronald Laing)

Nurse managers such as Heather Marin (who has worked at SJOG for 7 years managing 50 people including nurses, ward assistants, and Instep students) play a critical supporting learning role within SJOG. A major part of Heather's role is to 'develop these people'.

Heather describes herself as a 'St John person' – imbued with the values of the organisation. The values are fundamental to the way she encourages all the staff to approach patients and each other. She sees 'St John people' at all levels of the organisation playing a critical role in shaping change, attitudes and work. She feels that St John of God has helped her grow enormously. In developing leadership skills herself she has been supported by attendance at AIM management courses in the area of ethics based on scenario development and she has also learnt skills in teaching adults with particular emphasis on adult learning principles. She has also been given training as a facilitator of TQM implementation and these facilitation skills have been very beneficial in other aspects of her work.

Because of the breadth of nursing experience with people from many and varied backgrounds, there is a constant exchange of information which benefits the organisation. At ward meetings procedure and process issues are discussed and simple improvements are often made. One example was that of a sign that was created to stop people walking in on consultations.

This learning process is occasionally formalised and working groups are put together to develop a process or look at an issue. Heather worked with a group that developed the breast-feeding protocols. There was participation from ante- and post-natal personnel on this party.

When asked to describe SJOG in terms of a learning organisation she said:

> *It is a very generous organisation, where we listen to people and try to address their needs. It is an operational and strategic imperative that we do this. There is no option.*

She did comment that, as the business became more competitive that there was a need to be more creative when approaching development issues. She had networked with other people in other organisations to get information on HIV and its management. She used company representatives to train people in the ward by asking them to spend time training and as a way to encourage people to participate she always asked the rep to 'bring a cake'. From all descriptions, the bribe worked!

'MISSION VS. MARGINS'

> *You can tell whether a man (sic) is clever by his answers. You can tell whether a man is wise by his questions.* (Naguib Mahfouz, Nobel Prize Winner)

Senior staff members with budgetary responsibility, such as Peter Mott (Senior Administrator), see this dilemma as a key to encouraging reflection and constructive learning within the SJOG hospital. 'Everyone', he observed, 'struggles with the values words to ensure that they don't just become tokenistic. We want people's actions to be real and to reflect the values and that goes for me too.'

For Peter Mott, applying the values of the organisation means looking behind the incident in question to the principle involved. But when in doubt, mission has to override margin. He gave the following example.

> *Recently we had to face the prospect of replacing the dishwasher. This required a considerable outlay - around $100 000. But when I looked at the history and the facts, it was evident that it was already costing us considerably more in workers' compensation, and that these costs were likely to rise as well to compound the problems of low morale and poor work satisfaction. Then it makes no sense not to replace the machine.*
>
> *My task is to make money to spend wisely. We have to function as a modern corporation but we are also called to be good stewards of resources. This is New Testament based. I have also to apply compassion. We have, for example, a person who in another situation would be quickly made a redeployee. In my dealings with him, we have considered his future and I have told him to have 'a look around.' We will continue to keep him on until he makes a satisfactory transition. We won't act peremptorily. Meeting challenges this way will deliver a better outcome for him and for the workers around him. We will lessen the negative impact on staff and through the organisation.*
>
> *Living out the values is also evident in the way we deal with the change process. I don't get to move around the organisation as much as I would like to. But communication trust, empowerment and support are needed in change and I don't want staff to hear things via memo. It works far better when you can explain why things have been done a certain way and why other options were dropped. So I make the time to speak to people directly whenever I can and to be available to hear their concerns and points of view.*
>
> *My focus in management has been to assist staff to develop a sound business case to bring to others and me for consideration. This gives better performance management too. I have fortnightly meetings with my next level of staff. From these meetings they develop action items against which to report next time. I expect this pattern to flow down from them and into staff within their sections. I try to recognise the very different levels of skill among them and to use these skills appropriately for my tasks as well as for them to help each other.*

SALTY SEAS

St Helens, Tas

Salty Seas is a new and exuberant company processing oysters on the east coast of Tasmania. That it developed from a training program for unemployed youth in the area is just one more ingredient in this quite wonderful story of an innovative community-building and profitable enterprise.

Salty Seas is a very new enterprise with an interesting history. It grew out of a formal training venture. The enormous success of the training venture is having an obvious impact on the local community and beyond. Salty Seas has a strong commitment to formal training and exudes an energetic and supportive learning environment.

This training/learning case study needs to be understood within a broader community context. St Helens is a major regional centre and picturesque fishing community on the east coast of Tasmania.

Oyster farming is an important element of the local fishing industry. Several years ago the local oyster farmers wanted to expand their farming into Georges Bay. The local community was concerned about the spread of wild oysters in the Bay (from the stray spat of farmed oysters) and the impact of this on beach activities. To address this problem the local farmers worked at securing markets for the large wild oysters. Additionally, like many smaller regional communities, St Helens has a significant problem with youth unemployment.

In 1998, a 12 month aqua-culture (Cert II) course was established in St Helens for 12 people. Out of that program'Salty Seas', an oyster processing enterprise was born. Apart from its production agenda, Salty Seas has as one of its aims the training of staff in Seafood Handling. It is also working closely with the local NEET centre to create industry-based training for years 11 and 12 students.

THE PEOPLE

When talking about training/learning cultures, it is a mistake to put too much stress on the individuals. However, the people who make up the St Helens study need to be highlighted. Because Salty Seas is so new, it did not have a tradition or history of learning/training. Learning /training cultures do not just happen: In probing the Salty Seas story, names of key players kept being raised. And as indicated:

> *You need good support. A couple of enthusiastic participants make all the difference. You can deal with a company small, large or in-between, and if you've got one person that's sold on training, it's a breeze. If they're sceptical about it, it's a hard sell.*
>
> *I think we've had some very unique individuals who have been involved in the project. Their main drive has been to see things go ahead and to see things move. There's nothing selfish involved in their motives whatsoever.*

Two people (now co-managers) are key players in the Salty Seas story:

Lex Weekes
Lex was employed by the Beacon Foundation to establish the wild oyster business and to oversee the work of the trainees.

> *I've learned so much from him. He's a very disciplined, very organised, extremely approachable innovative guy, so I've been very privileged to be able to work along side of him and learn from him.*

Anita Astley-Paulsen
Anita Astley-Paulsen was one of the trainees in the initial project. At the end of the course, Anita won a number of awards: the Tasmanian Fishing Industry Award, the special category award Aquaculture – Shellfish); the National Trainee of the Year award; and an Australia Day award from the local community and Council for personal achievement. For Anita, the course was the bringing together of a number of interests and previous work experiences. During the course, Anita was used as peer mentor to the other students. Since then, her career in the fishing industry (and in training itself) has flourished.

> *I had been in and out of the fishing industry. My partner is in the live fish so I'd spent some time around live fish (deck-handing) and I spent some time, a minimal amount of time, around the crayfish industry. But it's always fascinated me – I've always enjoyed it.*

As important as key individuals have been, one of the most striking aspects of the Salty Seas story is the way the whole community at St Helens has been involved in the project. The oyster farmers, especially, worked very hard to try to generate employment (and training) to keep local youth in the area. From the very beginning, there has been a two-way link between the farmers and the Salty Seas program. The trainees were keen to tell the farmers about some of the latest research and developments they were hearing about. In turn, the 'old hands' shared their experience and wisdom with the trainees (and now, the company):

> *You'll find that the people, the farmers we've had around us and the mentors we've had have been very open with their suggestions and ideas, and we've been very lucky in that sense.*

THE INITIAL TRAINING PROGRAM

As indicated previously, this story started with an initial formal traineeship program undertaken with a group of young people in St Helens. By all accounts, the planning was thorough. It involved the collaboration of a lot of people, and it was rigorous.

A customised course
The twelve-month course developed for the St Helens project was coordinated by the Tasmanian Fishing Industry Training Council. From the comments about the course, it was obviously carefully customised around the needs of the individuals and the local shellfish industry. As pointed out, this often requires a careful balance between the two, and between immediate and other needs. Apart from working at the wild oyster processing at the St Helens site, there was a deliberate attempt to get people off the job to mix with other organisation, to share experiences and to see farms with a range of equipment. By all accounts the experience was a very full one.

> *We went Launceston and Hobart mainly. We did a lot of courses here – what they could bring here they did – some of the courses we were required to travel for full facilities to do shipboard safety and that sort of thing.*
>
> *The whole traineeship was a great combination of manual and theory courses or lectures if you like that applied directly to the industry. I use a lot of the things I learned every day.*

Getting the ticket

Getting formal qualifications appears to have been an important outcome of the traineeship program. Though there appears to be some scepticism in the industry about formal training, and the view amongst some that all you need to know you can learn on the job, for those who have been directly involved in the program, the story is one of 'the ticket is important' and highly valued.

As indicated by a number of those interviewed, having a certificate allows young people to go elsewhere (which seems contrary to the theme of keeping them locally). With a certificate and some local experience, young people 'have got everything they need to work in aquaculture anywhere in Australia'. People were aware of the transportability of some of the tickets to other industries and other parts of Australia.

> *I couldn't believe it when I came to the end of my traineeship. My partner and I actually sat down and had a big celebration at the end of it. I just laid all these tickets and said 'look at them: chain saw, forklift to… - you know.' He is someone who is very versed in all different sectors, has many skills and manual skills and yet has never had the opportunity to put a ticket against it. And, therefore, can't offer those skills for labour.*
>
> *It [the ticket] makes us more flexible in the workplace in the sense that we're now a valuable person. The workplace is a very competitive place now to try to actually get employment – it broadens your opportunities and your prospects.*
>
> *Tasmania offers very limited work opportunities, so always in the back of their mind is: 'If the work's not here, I'm going to travel – whether that be to Hobart or whether it be to Sydney or Queensland'. It's quite often what happens in the area – that's why with the Beacon traineeships, one point I made at the time was, out of ten of us that were here, eight of them would have left in two years simply because of work opportunities.*
>
> *A lot of the skills we learned probably didn't get utilised here as such. The fish knowledge definitely did and learning about what makes up a fish and how it grows. Things like occupational health and safety, documentation, all of that applied here. But some of the bigger tickets we got we don't actually utilise here. But in other areas of the industry they do, so the boys that have left from here and gone out to the farms are now utilising those other tickets they achieved.*

Learning the VET system

While the traineeship provided participants with the competencies and knowledge required for the Certificate 2 (Shellfish) course in the aqua-culture stream, it also introduced participants to the VET system; a system not without its complexities. One of the valuable outcomes of the program was an understanding of the system and the development of useful networks through which the system could be more easily accessed.

> *I'm learning it* [the system] *now and after my Level 3 I will straight away be looking at my Level 4. I eventually want to work myself up to an Associate Diploma - if I can do that independently, like without having to do too many contact hours at college. I just can't afford the contact hours - I don't have hours any more.*
>
> *In the last twelve months, I think the networking is probably the biggest thing that's come from the traineeship for me – apart from the knowledge and the skills and the course and licenses and everything I've achieved. The networking side of things has helped me immensely – you know, I ring people with an enquiry now in a certain department and someone will say, 'Oh, Anita, I'm sure … will help you out there or will sort it out…' It opens a lot of doors before you actually come to them.*
>
> *I'm still learning from the traineeship. I still have my handbooks and I'm still in contact with some of the tutors. I'm hoping to contact Dos O'Sullivan in the near future to talk about some other projects I'm involved with.*

Knowledge about the VET system is also used for progression through the RPL (Recognition of Prior Learning) process, to bring more training to the local area, to further the cause of training in the Fishing Industry, and to promote training in more general terms. A number of people expressed a particular interest in this aspect of the VET system:

> *There are a lot of people who've been in the industry for a lot of years and never had the opportunity to actually attach a ticket to their experience. A lot of them who are in the fishing industry can't book into a course during parts of the season, because they could be going to sea at any time. So what I'm going to try to do is tailor design it to each industry so that in the off-cray season there is a coxswain's course running. I'll be looking at my staff going through occupational health and safety, processing handling. A couple of them want to do their coxswains certificate as well.*
>
> *I've been discussing with the fishing Industry Training Board I may be able to get my Shellfish Aquaculture Level 3 on RPL as well, so I'll sort of go up a level on both on RPL, so that's very exciting.*
>
> *I've done my Level3 Frontline Management. We all did that at the end of our traineeship. I've got a gentleman coming up next week hopefully to sign me off – I've gone from Level 3 to Level 5. I'm basically going through the RPL process. John Jessop recognised that I probably had more skills than were put into this portfolio and suggested maybe I look at Level 4. After looking through the book and having a look at the evidence, I said: "Wait a minute, I think maybe I could go for Level 5.*
>
> *I've had discussions with him over the last few weeks because it's getting close to time for my assessment and he said: 'Now you're ready for level 5'. I've got all my evidence ready and he's coming up to just help me tie my evidence to my maps to make sure that we've covered all those and see if I'm ready for Level 5 – so that is very exciting.*

Apart from what individuals learnt during their traineeship, for those who have stayed on at Salty Seas, this itself has been a great leap forward in terms of applying their learning and taking it further. For some this has meant working on the floor. Some stayed for a while but many have moved on, to be replaced by other (often unskilled) workers, who are 'trained up' … and then often move into other parts of the industry. For Lex and Anita, the learning has been more intense. For Anita, it has signified a move from being a trainee to being a business partner. When this study was undertaken, Salty Seas was still in its infancy. Having the experience of working through 1999 when the venture was run as a local cooperative was a useful preparation ground.

LEARNING IN THE WORKPLACE

Salty Seas: A learning environment

One does not have to be at Salty Seas for long to get a sense of an enterprise which is still in the throes of new and exciting things, and where everyone is keen to pitch in to solve problems, whether it be: working out how to set up live fish tanks; maintaining the right temperature in the packing room; or cleaning out the drains. Though some of this comes about because it is a new venture and everyone is pitching in to help, it is also because of a deeper understanding of work motivation.

The richness of Salty Seas as a learning environment can be seen to be directly linked to the good experience of the traineeship program, especially for Lex and Anita who are now managing the enterprise. Both are committed to making more formal training available to the unskilled employees coming through their organisation and are actively encouraging them to 'get their tickets'. And both are committed to 'training up' within their own organisation. It is interesting to note that, in a way, Salty Seas is being used as a training/testing ground for other employers in the area.

> *Unfortunately yes - well unfortunately in some ways. Already this year I think four have left the factory since we started, to go and work at farms. They use this as a bit of a testing ground and … let Lex and I sort 'em out a bit.*

'Training up' is a term that is frequently used across industries as a way of describing the process of succession planning or skilling of people from one position to another. As an on-the-job training strategy it should not be under-estimated. The learning of a new skill or job alongside an experienced person, for promotion or transfer to another job, can be quite a motivating learning situation. For a number of reasons, 'training up' was in evidence at Salty Seas. Interestingly, in one of the examples given, the 'training up' of people on the floor is tracked back to the initial training from the traineeship course.

> *I did get to a stage where after two years in the packing room, it was nearly enough. So that's why I have trained Michelle up now and fortunately she's taken very well to that – she's fantastic. Like now, she'll quite often come in and I'll just be able to tell her what the orders are for the day and she'll only come down if there's a problem.*

> *We're pretty excited about diversifying into different areas and the staff all know that we will attempt to diversify and include them as much as we can so that their job doesn't become monotonous day to day – you know, going over the same jobs over and over again.*

> *Michelle spends quite a lot of time at the same table and I would like to be in the situation where on a quiet day like today I could say, 'Oh, Michelle, do you want to come and bottle some water or would you like to come with me on a fish run' … just to give her a bit of something different to do for the day.*

An educated workplace

A strong message that comes through the Salty Seas study is that of the value of an educated workplace; one that values open enquiry, which expects personal commitment to learning and where knowledge is shared. Obviously, in a small enterprise, that is relatively easy to achieve. Nonetheless it can only flourish where in the first instance there is a commitment to valuing an educated workforce.

> *I believe that an educated workplace is a lot smarter, a lot safer, a lot more efficient. By educating the people in the field they do, whatever that field is, if they can become an expert, more attuned to what they do, then it benefits the whole community. If people can learn a bit about their waste products, or about – you know re-utilising things, or … I think everyone's that bit better off.*

Sharing knowledge

Understanding the positive learning culture at Salty Seas is more than knowing that people are encouraged to ask questions and to know 'why'. It is more than the formal training materials and CD ROMs which do help base-level entry people get involved in training in an exciting way. It is also necessary to appreciate the enthusiasm and love of their work that Lex and Anita share. Nothing enthuses like enthusiasm. It is probably one of those truisms we all know - but nonetheless worth highlighting when we come across it – that the best teachers are the ones who exude a love of what they're doing. In such situations knowledge and learning is shared, not withheld.

> *I'm quite happy for my staff to learn as much as they can, and you know, we've looked into a different species here which is a native species, and a couple of my staff members were actually quite familiar with the fish, so …*

> *I suppose it's just the general attitude. Like you're not nervous at all. Normally if I'd go for a job, it's: 'Have they inspected me and what happens if I muck this up and how much will I be getting into trouble?' But here it's a relaxed learning atmosphere. They're sort of very casual. As long as you get the job done you can go and have a coffee for fifteen minutes if you want. If you get cold or want to sit down for a while, you can do that.*

It is important to note that at Salty Seas the sharing is very clearly two-way. Most employees bring immense local knowledge into the workplace; knowledge which is welcomed and valued.

> *We have great local knowledge – especially from the boys that we've got here. A couple of them were very familiar with that fish, so we actually asked them in for the day and they showed us how to process and how to handle them and different things about them and so we do leave that very open.*

Part of what creates the learning environment at Salty Seas is the energy and enthusiasm which exudes from Lex and Anita. They are responsive to new opportunities and challenges and encourage their staff to join them resolve day-to-day problems.

> *Anyone here who has a suggestion of ways for improvement … Yesterday was a prime example. Luke came to see me and he said, 'Danny's not wearing his ear muffs or the glasses – he's finding them uncomfortable. And I said: 'I know, if you bend over the glasses fall off', and he said 'Yes. he's trying to talk to some one and you've got dirty hands and you're pulling them down …' And Luke said, 'Have you thought about a chain saw grommet?' As simple as that, and I hadn't thought about it … and you can knock the visor up so you can talk to people and the ear muffs are attached. It was great. I went down the shop and bought it for him and he's now wearing his ear muffs and he's got a safety visor.*

This openness and working alongside staff not only taps into a greater pool of resources, it inspires staff confidence and the feeling that they are trusted.

> *When I've started at other jobs they kind of stand over you, make sure you do the job, make sure they're getting their money's worth out of you type thing. But when I started here, Anita would be with me, usually when we worked. But now, basically I'm left up there to just do what we're splitting in the morning. I'm left to do it myself usually, and Anita will come up every now and then and stuff like that – they've got that bit of trust left there too.*

SUMMING UP

At the end of the day, what are the messages that Salty Seas holds for training/learning culture?

- New enterprises can not rely on a history or tradition of training /learning. In terms of a 'culture', the traditions, shared values and behaviours are being established afresh. All individuals who form the enterprise Salty Seas, bring with them existing knowledge and attitudes and past experiences of work and of learning.

- The formal training program and the enterprise built around it (which eventually became Salty Seas) has left a lasting legacy of work competencies, and of understandings of, and attitudes towards, training.

- Salty Seas exemplifies a strong workplace learning culture and provides a rich data source for what actually constitutes such a workplace.

SIMPLOT

Kelso, NSW

The Simplot factory in Kelso has been through some difficult times - what workers there call the 'dark ages' - but things have been turned around. Training has played a role, but not training by itself.

The Simplot factory in Kelso, NSW - whose brands include Birds Eye, I&J, Sealord, Edgell and Chiko - is the home of the Australian fish finger. It is here that the nation's fish fingers and Macdonald's Fillet-O-Fish are made along with 72 other formed and coated frozen foods. The unusually large number of different products is made possible by constantly reconfiguring the two production and two packaging lines. The workforce is not large: 170 permanent employees which is expanded during maximum production by up to 100 casuals from a local labour hire company.

Most of the workers who come to the plant have had little (or no) formal training. A great deal of the work is routine and can be carried out by following a set of rules without great depth of understanding. But a very large number of things can go wrong on the line: a slight variation in the size of the block of fish to be processed will jam the works; a slight variation in temperature will ruin the product; boxes roll over. One of the mornings we were there, two lots of batter had to be thrown away because the balance was out. So, if the lines are to operate well, a great deal of skill, experience and nous is required.

Training has, necessarily, been an element in the operation of the plant for 20 years – both for getting novices onto the lines and for developing production workers and trades people to make the line work efficiently. Traditionally, however, the training of permanent employees was hit and miss. Who got the training was often a matter of favouritism. And it was a very authoritarian culture. Workers were not supposed to question *anything*. Someone who wasn't working quickly enough would be openly belittled by a leading hand. As Kaye Smith described it:

> *Our voice on the floor was nothing. If you ran out of product, there was a button to press. But we weren't allowed to press it. So we'd end up standing there with nothing to do.*

In the last few years, however, there has been a major change in the way training, learning and the whole operation of the plant has been conceptualised and managed. To understand the change, a little history is required.

The Kelso factory had been stable, relatively independent and profitable for its first ten years of operation. Then it was bought, first by Adelaide Steamship and two years later by Pacific Dunlop. In succession, these owners imposed drastic and, as it turned out, flawed changes. These included eight restructures in five years with constant alterations to managerial 'rules' – one phase which lasted a year had Kelso operating without a general manager or chief engineer on site. The packaging of Kelso products was redesigned and sales dropped 30 percent. *All* the leading hands were fired which meant, according to the original and now returned general manager, Bob Sugden,'80 percent of our expertise went out the door'. Further, during this period there was an intense battle between two unions for coverage of the site which led, naturally enough, to profound disharmony between the workers on opposite sides. It is no wonder they call it the 'dark ages'.

Then in 1995 another new owner: Simplot, a large American-based company, purchased the Kelso plant (it now owns eleven food processing plants in Australia) – although the Kelso site is a little independent of the large corporation in that it is actually a joint venture between Simplot and I&J South Africa. In 1996 Bob Sugden returned as general manager to revitalise this factory which was now losing money, without its expertise, and filled with tense, unhappy workers. His plan was simple:

> *I wanted to make the best use of as many people as possible. That means having each line be a strong, self-directed team.. But they could only be self-directed if they had all the correct skills, including (eventually) decision-making skills.*

The key was to create new positions of responsibility on each team and to get serious about training.

NEW TEAM RESPONSIBILITIES

A coordinator for each team

A team coordinator is responsible for fostering the team's capacity without becoming 'a boss'. Kaye Smith applied and became coordinator of one of the packaging teams. Her history is not atypical for the plant. She left school early, worked in a factory for 7 years and then left the workforce to have children. As coordinator she is responsible for:

- the labour on her line: depending on the products being made that day, she may need only 5 people on the morning shift and 4 in the afternoon. The day we spoke to her, she had 26 people working;
- the line running properly: 'I wear any problem';
- people getting the training they require;
- harmony on the team.

She didn't receive any special training when she became a coordinator, rather:

> *We were thrown in at the deep end, but in the beginning we were not responsible for so many things. We keep being given more responsibility but that's fine because you begin to know what you're doing.*

One of the things that did trouble her at the start was in handling people because there was a bit of resentment on the team with some of her co-workers saying 'you're getting paid extra, you do it'. Support was available: the supervisor called a meeting and explained the team had to cooperate. The team agreed and the problem went away.

Kaye has been enrolled by Simplot in a Certificate 3 Level course at the local TAFE, Central West Community College. The self-paced modules have been designed by the College specifically for Simplot Kelso and focus on the way the plant operates. Kaye and the others enrolled are finding the final third of the 900 point course hard going and most have chosen now to learn together. Ben Bardon from the College made an interesting observation: he believes that self-paced materials at Levels 1 through 3 work well 'when people already know 80% of the stuff. They don't work as well when the material is largely unfamiliar.' Kaye's story supports this observation.

A trainer for each team

Elaine Wilkin is the trainer not on Kaye's line but on the other packaging team. She has worked at Simplot Kelso for 16 years. For her official role as team trainer, she completed a train-the-trainer course which reaffirmed for her the importance of recognising that everyone learns in a different way and that the most important skill a trainer needs to exercise is patience. She has also discovered the value in teaching people at the point of need, so, for example, the time to train a person on how to fix one machine is not ahead of time but when the band comes loose.

Her goal, she says, 'is to train everyone up so they've achieved something.' Often her co-workers begin by believing they are not capable of learning to run and fix a machine by themselves. 'I'm dumb,' they will say. Elaine's response: 'Hmm, how dumb exactly are you?' 'High level dumb,' comes the answer. 'Well then, can I prove to you that you have abilities you don't know you have?' And she does. And takes immense pride in the achievement.

Having teams and creating leadership positions for line workers has already made an immense cultural change, according to Ray Chesher who is the production manager of the plant. But he sees the potential for the plant to perform even better 'once the coordinators are *really* leading their teams.' And how will that come about? 'By us – production managers, shift managers – spending a lot of time with them: walking and talking and giving them support when they've made a mistake.' What Ray likes to emphasise is that in the past there was little appreciation of the people on the floor:

> *People in manufacturing, in general, have been under-valued. Everyone seems to believe that factories are for dummies and that it is an unskilled environment. It is not. And if you treat people with the respect they deserve, they respond.*

A maintenance technician for each team

Maintenance had been the role of specialist technicians in the central workshop. Assigning them to be on a line and a full member of that line's team was to ask for an immense cultural shift. Before the change, when the trade-qualified technicians were all based in the maintenance workshop, they would go out on the floor to set up the machinery and depart. When a problem arose, the person on the line simply called up maintenance and someone was sent to fix it … grudgingly.

The technicians had a pretty low opinion of the line operators and when a call came through, the technicians' immediate reaction was that the operators were hopeless – they didn't know how to run the machinery, they were ruining the machinery, etc. Their encounters with the line workers were fairly tense. It was also the case, according to electrician Craig Lamberton:

> *We were out there every five or ten minutes fixing mundane problems. We couldn't get on with preventative maintenance work, there wasn't any time left. And we were losing two or three hours a day of production because of breakdowns.*

Giving each line team its own maintenance technician was, in the words of Ray Chesher, Kelso's production manager, 'a bit sticky for about six months'. Elaine Wilkin from one of the packaging lines put it more bluntly:

> *We didn't like them. We didn't want them – we thought our team was fine as it was. We had bad memories, too, of the days when there were leading hands on the floor, and they were leading hands from hell, I can tell you. They treated us like two-year-olds if you stepped one inch out of line.*

For their part, the maintenance technicians were being asked to share their knowledge – their power base, their security – and become a team player helping people (whom they did not exactly hold in the highest regard) learn how to keep the machinery working.

But slowly, once the line operators showed the maintenance people that they could learn and could fix things, it began to work. The technicians became more willing to pass on their knowledge. Change has become less of an issue on the line, according to Craig:

> *We've had a lot of new technology and people aren't scared of it. Before if there was a change, a technician would have to operate the machine for 2 or 3 days, now they'll pick it up.*

And people like Elaine discovered that if the coordinators were like leading hands, they were not 'from hell. They turned out okay: and they treat us like adults, we're free to speak out, even to suggest they might be wrong about something.'

The results are interesting. Instead of the two or three hours a day lost to breakdowns, the figure has fallen to half-an-hour. Why? Because the people who have stayed in the central workshop can now spend their time on pro-active maintenance; they've installed a system so they can track breakdowns and investigate why they've occurred. On the line, the maintenance people are at hand to keep things running and anticipate troubles with the machinery, and the operators themselves now know how to fix some of those mundane problems.

There is a significant amount of learning in all this. Some of it is the 'traditional' transfer of skills and knowledge from someone who has it to someone who doesn't. But there is a more subtle element of learning at work here, too – *new* knowledge about how to work, and work together, which has been slowly generated by the team members themselves.

A NEW APPROACH TO TRAINING

The formal design of training at Simplot Kelso has undergone some major, and instructive, changes in direction over the last four years. It started from a base where training had been largely neglected: employees were not treated as an asset – indeed, they were not considered to *be* an asset. They were trained to use this machine or that, full stop.

Training began with the whole site studying the core modules for Certificate I through the local TAFE, Central West Community College. In many ways the exercise was successful. Almost everyone (95%) completed at least some of modules. It introduced core concepts like hazards, occupational health and safety, sanitation and hygiene, and gave everyone on site a shared (and correct) terminology for the technical tasks and machines on the floor. It was non-threatening: the assessments were done on the line and positively focused: 'show me how '..."tell me what ...' The workers were basically keen.

But, there were problems with the scheme, too. The production manager saw great waves of people coming and going off the floor and didn't see any productivity gains. Nothing was different on the lines: the quantity of fish fingers hadn't gone up; the machines were not being used any better. It seemed too academic: people used to say 'do you have school today?' Furthermore, it cost, in the words of Barbara Brackenreg, Human Resources Manager, 'an arm and a leg'.

It was the Simplot corporation, however, who actually called a moratorium on the training plan. It was a decision that caused a distinct backlash. Morale, and indeed, production on the Kelso lines dropped noticeably. The workers on the site Training Committee were furious at having been promised something and then having the company renege on it. There were some tense and unpleasant meetings. Ben Bardon from the Community College could have been furious too: the College had a contract to deliver the Certificate I modules and they were only 2/3rds of the way through it.

Cool heads prevailed. Kelso and the College made it an opportunity for a thorough rethink of training. The first thing they decided was to stop thinking in terms of certificates and start thinking in terms of what the staff actually need to be trained to do. It seemed obvious, then, that what was needed would be to identify each of the tasks done on the lines and write detailed work instructions for them. A team of people from the College then worked for a year with workers on the floor to identify these tasks (there turned out to be some 270) and to document all the steps involved in starting, operating, adjusting and stopping the machinery, the hazards associated with each task and other relevant information. Currently the work instructions are being linked to the Food Processing Training Package.

One issue which needed to be clarified and negotiated with the workers was the knotty one of whether, once people have received training, increased their skill base and worked at a range of tasks on different lines, they should receive a commensurate increase in pay. Workers felt that one of the reasons Simplot backed off taking everyone to Certificate 3 and doing a skills audit on the trades people was because the company would end up with a blown-out wages bill. By designing the work instructions and bunching the associated competencies into designated Certificate levels in the training Package, the company has made it clearer that as long as a worker stays at the same certificate level (even though they may be applying their competencies more broadly across more tasks), they will not get a pay rise. This framework has met with general support across the plant.

Simplot Kelso has also used committees to good effect. The Training Committee includes the General Manager, Bob Sugden and the Manager of Human Resources, Barbara Brackenreg but the remaining 80% of its members come from the plant floor. As Craig Lamberton, an electrician at the plant said:

> *The fact that these people became such 'champions' of training has helped to ensure widespread support from the other workers. The various training initiatives are seen as 'coming from us' rather than being a top-down decree from management.*

As more than one person said to us, 'the days of waving a big stick are over.' In practical terms, too, having the training experts' be one's co-workers means that people throughout the plant can be kept informally up to date about what is going on and what is planned, and, even more importantly, have access to colleagues who can answer any questions and convey any concerns.

CONCLUDING COMMENTS

The picture of Simplot Kelso should not be imagined as too rosy, nor in any sense complete. There are still workers who are not interested in this 'learning' attitude to work and the workplace. Bob Sugden, the General Manager, believes that much more work needs to be done on the teams' decision-making skills which, he also believes, will be a challenge:

> *It is a question of getting people to not turn a blind eye to problems which might be affecting the profitability of the plant, in a cultural environment which feels that raising issues may involve dobbing in your mates. We have a lot of thinking to do about that.*

Nonetheless, the achievements have been impressive and, significantly, impress the employees themselves. What stands out is the way cultural change has been brought about *without* changing the people involved. It was the Production Manager, Ray Chesher, who pointed out:

> *That is the only way to get a lasting and stable change in a workplace culture. The idea that you fire everyone or bring in smart new bosses from the outside is an almost childish - certainly short-term - view of cultural change.*

The company has become one of Simplot's strongest profit centres and its output is increasing. Its efficiency has improved. Three years ago they were loosing $600,000 in direct labour (that is, wages paid out but because of inefficiencies, break-downs and mistakes no product was produced during those paid hours); now it is $120,000. Some lines are meeting their target output at 101% - that is, neither under-producing each day nor over-producing - whereas it has varied between 80% and 127% in the past (over-producing causes as many problems as under-producing because of storage pressures). There is less absenteeism; workers on the line have become more supportive of one another; they *are* working as teams and everyone seems to sense a new spirit of cooperation.

Training has played a significant role in all this, but it is not the only driver of learning and cultural change. There has been a co-evolution of organisational change and strategic learning. Indeed, Barbara Brackenreg, manager if Human Resources, is the first to admit that it is not easy to know what part the training dollars have played in fostering the changes:

> *I would never try to claim that the observed improvements are due simply to skill training. It is much more complex than that.*

SOUTH SYDNEY CITY COUNCIL

Sydney, NSW

When South Sydney City Council was established ten years ago, the doom-sayers were sure it would go broke. It hasn't. But neither has it developed the kind of culture it wants. Improving training and learning in such a diverse organisation to accomplish that is far from easy.

As you can imagine the South Sydney City Council (SSCC) with 1,000 employees is a large organisation, both in width and in depth. Its responsibilities are vast and cover the maintenance of urban and parkland areas such as the *Domain* and *Centennial Park*, through to shire management at the most senior of levels. With such a gamut of responsibilities you may suspect that the Council has little advice to offer smaller businesses. You may be surprised!

Most people in business are aware of how difficult it can sometimes be to develop a change in the culture of the workplace. Peter Chaffe, the Organisational Development Officer, for SSCC, is the first to admit that local government is an extremely good example of a 'hard culture to change'.

Traditionally local government acts in an authoritarian manner because of the statutory obligations which must be fulfilled. The Directors of key departments must report regularly to the Council. Senior officers act under delegated authority. Council staff balance carrying out a range of community services with maintaining a service orientation to the local community of ratepayers. In keeping with other areas of government, ratepayers expect to be informed, consulted and involved to varying extents in a range of projects that affect the quality of their lives and their communities.

Given these features of the organisation, knowing where to begin to effect change was difficult. However, as is so often the case, where there is a will there is a way and it was this determination that in 1996 gave rise to a review of Council which, not surprisingly, suggested that it needed to attend to both its internal and external culture. The report identified problems including a lack of trust, poor communication and 'a silo-like structure' that separated departments' and units' activities from one another. Improving the internal culture was made a matter of priority - a decision that received enthusiastic support from staff.

To address some of the management problems Council formed a learning partnership with the University of Technology Sydney (UTS) through the South Sydney Region of Councils. UTS agreed to develop and deliver courses to key middle managers to be geared specifically to the needs of the staff in various sections of SSCC. The courses were delivered on-site at times that suited employees. Successfully completed units could be credited to the university's graduate management qualifications.

It was through this partnership with UTS that Alan Wren (Manager of Human Resources) completed a project to develop a Performance Management System. Alan's project arose from reflecting on what might be undertaken that would add value to SSCC as an organisation and to him as a manager. He elected to invest his time in developing and implementing a Performance Management System for his unit.

Several years after completing this unit Alan is still enthused by what he managed to achieve:

> *I have developed a System that fits this organisation. It is more of a 180-degree system than a 360 degree one. In other words, we have focussed more on gaining feedback from staff reporting up than reporting down. The System is very comprehensive. The consultation processes through the project resulted in people involved coming away with a different perspective - including the General Manager.*
>
> *The UTS courses and the project processes broke down some important barriers within SSCC and the silo mentality we had in our sections. For example, town planners and engineers now know and exchange ideas with one another. Previously they would have had little chance to interact.*

Alan believes that the new flexible approaches in training go a long way toward making learning partnerships really worthwhile for businesses today.

> *The System took time to develop - nearly 18 months in all. I was in charge of the progress and completion and I had the opportunity to do the work that was needed to arrive at something to suit this organisation. There was negotiation with the UTS supervisor and my colleagues at SSCC regarding what the project would encompass. I had to meet criteria acceptable to UTS - such as the scope of the research review and the methodology - as well as aspects that met the needs of SSCC strategic initiatives.*

Currently, within SSCC two key individuals are responsible for learning/training. Both believe that having a training culture means moving the training more to on-the-job skills where what is learnt can be directly applied. Peter Chaffe's role is that of Organisational Development Officer, with particular line responsibility for the executive functions of the organisation. Don Mould, Director of Training, on the other hand, has specific charge for the majority of workers. These include the counter staff, clerical staff, civil construction workers, gardeners, etc and their supervisors.

Their two approaches to learning and training reflected quite distinct approaches for employees at the managerial level and the 'workers', with no crossover between them. The differing needs and ways of dealing with staff development in the two groups provide varied examples of how organisations might go about undertaking training. However, it should be noted that major and distinct variations in opportunities available to staff at different levels can run the risk of adversely affecting a training and learning culture.

When considering the executives' professional development, Peter Chaffe realised that staff valued and benefited from meeting colleagues in different sections of the organisation and began to consider how opportunities could be furthered beyond the more limited ones afforded to those enrolled in the UTS course. It was through this thought process that monthly Breakfast Club meetings were instigated. The meetings are open to all staff of Grade 13 and above. Each month about 60 staff gather over breakfast in the conference /Board room to hear from an invited speaker. The program includes both external and internal speakers and the topics are of general interest - for example, the next guest speaker will be an Aboriginal person talking about reconciliation.

The initiatives for senior managers differ to the approaches required in accommodating the training and learning needs of the majority of Council workers. Don Mould believes there are some important fundamental attitudes which have to filter from the top if you are to succeed in bringing about a change to a training and learning culture.

> *Firstly your own attitude has to be transparent and open. You have to believe that there is value in distributing knowledge and power, and also that the processes of training have real benefits for*

> *organisations. Unfortunately in this job you encounter continuing resistance from people who believe exactly the opposite, who behave as if control and retention of knowledge is the best way to wield power. But your task is still to effect change under these circumstances.*

In saying this, Don is identifying the fact that within SSCC there are some people who have risen to various levels of responsibility without qualifications and that, sometimes, people who have been promoted in this way find it difficult to encourage younger workers to complete TAFE qualifications. It is for this reason that some of the gardeners opposed outright the move to give labourers opportunities to do Certificate 2 and Certificate 3 courses in horticulture.

The challenge facing the SSCC with regard to the supervisors was often referred to. Whilst there was an initial tongue in cheek comment that in Councils the three R's don't change much - *Roads, Rates, Rubbish* - there are signs that things are changing at SSCC:

> *Training has changed, roles have changed. The Council is more human resource orientated now. I did not have a computer when I started and now there is one on every desk. There is a new payroll system, competencies, remodelling and updating going on all the time. Through all this it is the top levels and the supervisors that remain the most challenging to deal with in terms of personal learning.*

SSCC applies a Recognition of Prior Learning (RPL) framework to take workers up to Certificate 3 level in clerical and civil construction areas. RPL can be used to take workers up to 60% of the qualification, but in the case of SSCC Don observes that'RPL is not well integrated and finds the TAFE approach to be a more reliable index of competence.'

At SSCC there are many initiatives in place, many barriers still to overcome and many challenges ahead. Don Mould is a firm believer in training needs analysis. He describes his role as 'juggling fire fighting with long term planning' and discussed some of the challenges still to come:

> *Training isn't just doing the task—it's also thinking about the task and wanting to do the task. Missing at many levels of the organisation are mentors, continuity and generalisation. These are the harder features to put in place to make the training really work. It isn't enough to train workers, you need to change motivation and reflection about what they're doing and why. It's best when you have confidence that workers in the section or team have these attributes.*

From Don's point of view four areas have to be in balance and integrated to make training/learning effective. He diagrammed them as follows:

Structured Process	Training Process
Employee Request	Management Request

> *When these are out of balance it is really difficult to make your training program work effectively.*

Some of the strongest evidence of the personal value of formal, competency-based training comes from staff employed in the Depots in the maintenance sections of SSCC. Mick Huskell, who has been involved with the SSCC as a civil construction worker for many years has been really enthusiastic about the changes he has noticed as a result of training initiatives.

When competencies were first proposed as a way of workers achieving higher skill levels, Mick, like other workers, was a bit sceptical. Once he became aware of the potential impact that competencies offered, including national recognition and portability across jobs and industry, he looked harder at the scheme.

> *Before we had skill recognition, the truck drivers were the only ones thought to have skills and they were the ones who progressed, so they ran all the jobs. Now we can all run jobs if we get our skills recognised.*

As Mick and others began to record and develop their skills and competencies they gained opportunities within Council to progress. Mick has become heavily involved in training and has been to Adelaide to benefit from train-the-trainer work in a Registered Training Organisation. His experiences in working along side a registered trainer and seeing how a well equipped training centre (industry funded) operated opened his mind to the complexities and skills involved both in training and accrediting training. With the trainer as his mentor, Mick came to appreciate the range of skills and steps involved in the processes of work planning.

> *At the start no one sexactly are you?' ' ities you d There was no reward for skilling staff. Some blokes dropped out of training because they were promised promotion. But this wasn't going to be guaranteed. Now we have 80%-90% involvement in training on the job. And the workers know what they have to do to get a pay rise. We developed the log books and gave them ways to gather their own evidence. Once they did that bit they soon got rewards!*

Mick believes that the trick to helping people who are uncomfortable about taking up training is to not give them too much (i.e. learning material or thick log books) at the start or they won't do it. The instructions must be written in plain English and relate to work practice, and the material is self-paced without needing a great pile of books. Then, he says, put together the work place assessors and get them accredited. Mick has also observed that this process has stopped the supervisorso'picking heads' and given the construction workers a better opportunity to learn.

The training program for members of staff at the depot rests upon individuals identifying what they need and then notifying the Staff Training Unit of their request and seconding other colleagues into enrolling for the course they want offered. Once a critical minimum enrolment number is reached and enough people add their names to the list, the course runs.

> *Anyone can get what they want if they can say: the boss wants it, I want it, and other blokes want it. Naturally the Council also benefits.*

The practicalities of the training initiative meant that some people were transferred so that those training were in the one depot. The rostered days had to be changed over the nine months of the training course and all the pays were submitted on the one sheet.

> *No one relies on the training to keep the job but they can see how the learning of levelling and maths works on the job and individuals doing these sessions are gaining self confidence in working things out for themselves. It has gone from a mentality where the supervisor is always on your back to one where people take a responsibility for tasks themselves.*

The Depot workers have responded positively to the whole range of changes:

> *When I do on-the-job training I enjoy working with the team. We often have to work things out together and we learn about one another as well as the skills. Getting the Certificate Level 3 means I can go anywhere but I like the opportunity to train on the job here.*

Mick judges the effectiveness of a course by the retention of the participants in it. He notes the difference between trying to run things in a classroom and running things on the job.

> *Thirty minutes in a classroom and you've lost them. We put them out on the job with a task and make them plan what their going to do. We get them to write a specific plan for me or someone else to*

> *carry out. They have to watch us do what they wrote. And then you get them. They soon know where they went wrong and we can help them fix it. They know what they've got to do and nobody saidn'l told you'.*

Doretta, one of Don Mould's associates in the training unit, reflected on how the unit used to aim to target people into the right courses at the right time. She considers that not only was this impossible, but it didn't bring together learners at different levels so that they could share their experiences with one another and assist informal learning within the organisation.

Of course, learning and communications are not just limited to the staff. As a large Shire Council the SSCC has many clients and stakeholders and many residents are migrants with limited knowledge of the English language. The SSCC's understandings of how important 't know you have?' A and someone proved beneficial to the community as a whole.

A few years ago, the SSCC multicultural officer decided, that in order to help residents learn about the SSCC, meetings should be held with various ethnic groups and advertised through the appropriate local ethnic community newspapers. This initiative had an immediate impact. For example, in Redfern the Russian community had borrowed many Russian language books from the Library and not returned them. Through the meeting it became clear that the community had not understood the library process and the library was astonished at the rate of return and adherence to borrowing rules following this meeting.

When Members of the Chinese community were taken on a guided tour of South Sydney to help them learn about the Council and the community, some residents began to wonder if some of the small plots of unused land they saw could be used to plant vegetables. Council obliged and these small oases have now become a focus of outdoor activity and exchanges.

South Sydney Shire Council is the first to admit that it has some real challenges still to face when examining its learning culture. Its recent experience of having managers work the one stop shop and finding they did not know the answers to many of the intricate questions posed by stakeholders, shows that divisions and communication problems are still present. The reluctance of supervisors to embrace formal training initiatives is very much embedded still and there is a visible difference between the treatment of workers at higher managerial levels and those at the coalface. Despite these challenges the Shire has made some significant breakthroughs.

It has convinced about 80% of a workforce who were previously uninterested to take control of their learning and to pursue training and learning opportunities. There have been networks established between workers, departments, other Councils, the community and between training providers and the SSCC, which have led to demonstrated efficiencies and understandings. The organisation has signed up to be a St James Ethics Centre Corporate Member because 'as a major big business we have to think ethically about our business dealings, values, awareness and training of staff'. This raises the point that sometimes simply thinking about improvements and searching for frameworks and guidance can be a really important step.

STELFORM ENGINEERING

Bennetts Green, NSW

The Managing Director of this pressure vessel design and fabrication plant decided he would introduce 'soft skills' into a 'hard' technical and business environment. It was a highly contentious program, to say the least.

Stelform Engineering designs, manufactures and erects a wide range of high quality pressure vessels used in industry for heat exchangers, boilers, ducting. It currently has three workshops, all in the Newcastle NSW area. The company was set up ten years ago when Tubemakers, the large metal fabrication firm, decided to close down its Newcastle pressure vessel plant. Eight of the men involved in the Tubemakers' operation (three managers, five tradesmen) decided to buy the business and restart it as Stelform. They remain the company's eight shareholders.

Setting up the business was considered, by their colleagues at Tubemakers who did not 'buy in', as a risky, perhaps foolhardy, venture. In fact, it has proved very successful. The company trades on its reputation for high skill/high quality work and has grown from its original 25 permanent employees to today's 100 - the majority of whom eventually came from Tubemakers. Over the last six months, having won a succession of fabrication tenders, the pace of work has been particularly demanding and, stretching them further, they have a team working on site on a major project in Queensland and they are setting up a branch in Western Australia.

Past success is no guarantee of future success, however, in these times of a globalising economy. The local television news on the first evening of our visit displayed the problem in graphic detail. It showed footage of a ship entering Newcastle Harbour earlier in the day. It was laden with steel pipe fabricated in the Philippines for the Hunter Valley's new $300million Redbank power station. In the 'old days' (of a few years ago!) pipe for that project would have been made in Australia, most likely by Stelform.

The company has come to believe it will find it increasingly difficult to compete with the big international producers of pressure vessels, even on quality. They are rethinking their business strategy, increasingly looking at on-site installation of other people's equipment, solving plant operational problems, designing and perhaps implementing major plant shut-downs. To make this shift, John McColl, Stelform's Managing Director came to the view:

> *to fully develop the potential of the organisation, there has to be open communication up, down and across the organisation on all issues – that is the only way we are going to get anywhere. We have to be able to look inside ourselves honestly and understand what is going on.*

McColl recognised that if he was serious about open and honest communication, then the people in the plant – himself included – would need new skills. At HunterNet, a cooperative of specialised engineering firms in the Hunter Valley, he had attended a seminar presented by Jennifer Elliott who owns a small training company, Soft Skills Australia. McColl contacted Elliott and they negotiated a contract whereby she would work with Stelform employees for a few days every month for two years. This was a major commitment both in time and in money – as McColl puts it, 'It was painfully expensive, we had to take big swallows,' but he was determined to re-visit (and change)'the way we behave and conduct ourselves'.

The term 'soft skills' is often used in a loose sort of way to mean listening and being nice to people. To Elliott soft skills are quite specific. They are the interpersonal skills needed by people who work together to enable them to speak frankly, but constructively, with one another. It is her view that most people in a work environment 'collude' in that they evade difficult issues by unspoken but mutual consent. But then, because in the end the problem needs to be resolved, they 'fight dirty' (usually without even recognising that is what they are doing).

Now this is an odd claim to apply to Stelform because as a technology based company whose market edge is to solve complex problems to meet each client's specific requirements, its engineers and production workers *necessarily* debate daily at length, in detail and with complete frankness the 'ins and outs' of a vast array of technical issues. But McColl recognised that outspokenness about technical matters does not mean people are equally comfortable confronting one another over procedural and personnel decisions. In fact, on those matters the traditional hierarchical style of management prevailed.

The senior management group did recognise that when they discussed procedural matters which were important but not urgent and there was a difference of opinion in the group, they tended to let the matter ride. As Robert Gibson, the Financial Controller, said,

> *We knew there ought to be a better way but we thought it was mostly a question of not making enough time available to sort through the issue. We also assumed that this was a common problem for businesses and that we were not in any way unusual.*

Thus, staff were not opposed to tackling the Soft Skills program, but without McColl's insistence, they would not have thought their problem was significant enough to warrant major intervention.

THE SOFT SKILLS PROGRAM

Major intervention is almost too mild a term for the approach Elliott used. Confrontation might be closer to the mark. She herself describes what she does as 'hammering them…holding them up against their problems…forcing them to see.' She began the process with the six members of the senior management group, which is known at Stelform as 'the first tier' and later started working with the second tier managers. These two groups got the 'full treatment' of training which involved a day, and sometimes more than one day, a month with Elliott. Towards the end of the program another 15 or so people at the top end of the company were given a two day 'overview' session.

Elliott's soft skills program works on two fronts: one is with the individual managers; the other with the management group as a unit. With the individuals, the process begins with a questionnaire which is then computer analysed and a score (between 0 and 100) generated on 11 'executive aptitudes':

personal honesty
self-esteem
happiness
confront paperwork
organisation
ability to talk
ability to listen
warm and sociable
appreciation
reliable
confront people

The individuals who thought their analysis was 'spot on' were impressed – even if they scored poorly on some attributes – and their confidence in the program was secured. But others thought their assessment was hopelessly wide of the mark. One person, for example, who had thought his self-esteem was just fine received the remarkably low score of 20 and was very angry. There was also the situation that people who rated low on a particular attribute -'confronting people' was a common one - liked that aspect of their personality and had no desire to change or to be changed. Several were annoyed enough to try to get out of the program. The requests were refused.

There were a number of individuals in the first and second tiers, however, who said they were open from the start to personal change - for various reasons - and responded positively. One wanted to ensure he was minimising his stress levels as a close friend had died recently from cancer and he believed stress had been a major factor. Another recognised that 'what I hate most in others is probably what I hate most in myself' and he was determined he would learn to be less arrogant. A few were simply more tolerant of the 'shock tactics' and willing to see that there was room for them to change 'if that's how it developed.'

It was also interesting that different people responded to different aspects of the program. Some liked it in the beginning, but then felt they stopped getting much out of the one-on-one sessions. Others got more used to these sessions as time went on and got more out of them. Similarly with the group activities which sometimes involved 'games'. Some people thought this an unmitigated waste of time, others increasingly came to appreciate them.

OUTCOMES

What developed for the first tier managers is that they did begin to work much better as a team. Elliott, for all the insults she handed out, also taught them some real skills in interpersonal relations and she acted as a coach so people would check with her 'did I handle that right?'. In fact, even now a year after she finished with the company, people will still sometimes say in a meeting: 'now, what would Jennifer say?' She also had them deal with some of the issues they had been letting slip. At one meeting, the combined group of first and second tier managers compiled a list of seventeen tasks which, if they were tackled, should save the company $1million per year. These included standard terms of offer for different client groups, effective information transfer to shops, commitment to safety, accountability of project engineers.

One of the most successful of the tasks that was attacked was establishing a continuous improvement process in pipe spooling whereby tradesmen would check their own work. This was to eliminate the need for supervisors or quality controllers to do full job inspections every time because that was both expensive and did not eliminate the source of the problem. One must be clear about this, problems were always corrected, but preventative action so the problem did not recur was often let slip. Through a series of meetings, ways of recording and quantifying results were discussed. As Gibson reported, 'I made a number of draft recording sheets and presented them to a meeting; this was about as close as they came to sneering *but I was not discouraged*. I asked how they could be refined...' This perseverance in the face of protest about something that was not of immediate and critical impact was new to Stelform, and has paid off.

Another shift attributable to the soft skill training was overcoming senior managers' reluctance to deal with an issue for which they did not have line responsibility. For example, Bob Masterson, Project Coordinator, felt 'stuck' if he wanted something from someone who didn't report to him, what right did he have to insist? The team's soft skills work made it clear that anything which affected Stelform *is* the business of each member of the first tier.

> *Now I see myself as a people manager rather than a 'nuts and bolts' manager. I don't enjoy conflict – no one likes to be in a dispute situation - but I know now how to focus on the problem not the person, and I tackle what has to be done. Problems avoided do not go away.*

We heard a range of 'testimonials' about positive improvement in first tier management group from their soft skills training – from people outside and inside the first tier (including from the first tier manager who had been so offended initially by his self-esteem rating):

> *You can speak your mind without offending people and that is a big change. Everyone speaks in senior management meetings.. We sometimes relapse but it has oiled the team and, all in all, it was a good program.*
>
> *It has enabled us to express our emotions a bit more. We've learned to say things like 'this is how I feel about'... rather than either withholding comments or abusing the other person. We're personally closer now.*
>
> *The whole place is less autocratic now. You could definitely talk better to management when the course was on. The company runs better now.*

The outcomes of the soft skills training program for the second tier managers and supervisors were a little more muted and mixed. Well, in the beginning their reaction was not muted at all: they wanted to pull the plug, full stop. McColl listened to their complaints and did see that some adjustments were made so that it focused more on company issues. But, basically, the insurrection was put down because McColl was determined to see the program through.

Nonetheless, the effectiveness of the program at the second tier was not as strong as in the first tier. This was partly because the second tier received less training; partly because they work in various parts of the company and do not function (and are not intended to function) as a single team. This second tier also became responsible for the spread of soft skills to the people on the shop floor – a task which they did not, by and large, feel capable of handling. Fifteen other people at Stelform received a two-day 'overview' of soft skills but that was never going to change their capacity to interrelate more effectively if significant change (learning) was required.

There was a fairly consistent message from the second tier and 'overview' participants that for sustained and deep cultural change at Stelform, soft skills training needed to reach everyone. As one supervisor said, 'it's all right me learning to communicate assertively but fairly with the floor, but the blokes on the floor need to communicate with me in the same way.' There was almost a sense of disappointment that it had stayed a program for the top of the company because there had been, it was reported to us, genuine enthusiasm on the floor about everyone learning to communicate better.

OTHER TRAINING AT STELFORM

We set out specifically to look at the soft skills training at Stelform but inevitably as we interviewed people the whole range of their learning, especially technical learning which is so critical to Stelform's success, was raised and discussed.

The fact that Stelform grew out of Tubemakers has had a big influence. Tubemakers (with BHP) had placed a strong emphasis on highly structured apprenticeships and formal training programs which provided the skill base for many smaller employers in the Hunter region as well as for themselves. Training and its benefits were still valued in the new company but the training was predominantly based on each individual's own interests rather than on highly structured formal programs.

That was a logical tack for the much smaller company. Currently, however, because the company is getting larger, because it needs new skills, because of the near collapse in good apprenticeship training and the aging of its own workforce, there are signs that a shift is occurring. This might see Stelform moving back into the more formalised training agenda of its historical roots and, in particular, it has embarked on an ambitious apprenticeship program where the company has taken on ten apprentices, amounting to almost 10 percent of its workforce.

Nonetheless, training undertaken at Stelform is still best described as being responsive to individual needs. Individuals interviewed were able to describe a range of training/learning in which they have been involved. All of them reported learning and developing at work; none gave the impression that they felt they were stagnating – in fact, quite the reverse. The topics they choose to learn about is wide – ranging through new codes, new software programs, occupational health and safety, research seminars on new materials and some personal choices like parenting skills and karate. As one person said, 'if you offered to guys on the floor to do what they wanted, they would choose as varied a range as the people themselves'.

Not only is the choice of topics broad, the way people's learning took place showed even more variation. These included:

- Learning from each other
  Talking to others and tapping into their knowledge appears to be something that most people found relatively easy to do. People said things like: 'You have to do the job, so you have to ask'; 'Out there on the floor people talk to each other a lot.'
- Learning by doing (and, sometimes making mistakes)
  People often mentioned learning on the job and having to solve problems; as suggested by one person, he had to solve his 'own problems', his 'own dramas'. 'Growing with the new technology' and learning on the shop floor was recognised as an important part of learning on the job.
- Interactive computer based courses
  This suited one person, but he was careful to point out that this style doesn't suit everyone. He told the story of computer training that was offered on CD ROM. This involved self-directed modules which were ticked off when completed. Only three attempted the course, and only one completed. As he said: 'Some people prefer more directed, lecture type learning situations.'
- Reading
  Reading was often mentioned by people. Apart from reading about technical aspects of the job and new technologies, people read (and listened to tapes) about things like conflict resolution, team building, organisational behaviour. 'If I see something new, I read about it and then follow up.'
- Acting up
  In-house training for people to 'act up' in senior positions (for example from Leading Hand to Supervisor positions) was another training/learning strategy. This was necessary to fill positions when people were on leave, but was also a mode of succession planning. This form of learning is especially useful when people are on leave for a relatively long period because it gives the person being trained a longer trial and was better for 'getting your teeth into it'.

- Attending formal off-site training courses and conferences
  On the first day of our visit, the company's Managing Director was himself away the first day of our visit at a computer course. Thick books of conference proceedings on material fabrication could be seen on office desks.

CONCLUDING COMMENT

Technical knowledge at Stelform is at a premium and the way the company deals with this kind of training and learning is interesting but not innovative. Where Stelform departs from the norm was the introduction of soft skills training into this world of big machines, heavy steel pipe and welding torches. The soft skills program that Stelform undertook over two years was difficult. It caused mistrust amongst some of the people who didn't receive training or received it only late in the day. It caused huge discomfort, even pain, for some people who were fully involved in it.

The *personal* changes and insights into individual's own ways of thinking and acting which Elliott's 'treatment' delivered have survived well. Many individuals reported a sense of personal change. One person indicated: 'I've changed and seen an improvement overall in the company.' However, when asked if he had seen a change in other individuals, he was not sure: 'It may be they weren't as bad as I thought and that if I see a change in others, maybe that's because I approach them differently'. A soft skills program can hardly ask to be more effective than that. Its one flaw is that it was confined to management.

UNIVERSITY OF WOLLONGONG LIBRARY

Wollongong, NSW

The library of any university employs a diverse staff – from the people who stack shelves to senior managers. This library has managed to forge a cohesive and impressive whole out of its separate elements – winning *business* awards - by taking 'investing in people' seriously.

The University of Wollongong is a regional university south of Sydney in the Illawarra region of New South Wales. It became autonomous in 1975, having previously been part of the University of New South Wales. It was recognised in the 1999 University of the Year awards for its work with overseas students.

This case study focuses on one section of this diverse institution - the University of Wollongong Library - a 1998 finalist in the Australian Quality Awards for Business Excellence. It outlines how the University of Wollongong Library achieved recognition for business excellence - and its process of striving yet higher.

The library, which employs 64 permanent staff and up to 20 casuals, is the first one in Australia to be awarded the Investors in People (IiP) standard - an internationally recognised standard concerned with achieving best practice in the management and development of people to achieve organisational goals together with a framework for ongoing evaluation and improvement.

All libraries - especially university libraries - are confronting major change. More books are being published on increasingly specialised topics. Journal offerings continue to widen while current and past journal volumes are also becoming available electronically. Published scholarly books and journals (whatever their format) are increasingly expensive to acquire. The available purchasing budget is shrinking (along with the buying power of the Australian dollar in overseas transactions). Student and staff demands for specialised material are increasing; and there is an ongoing need for everyone in universities to update skills in information literacy and knowledge management.

Like other universities, the University of Wollongong Library has undergone budget cuts, staff redundancies, increases in the proportion of casual staff hired, technological transformations, and a growing demand for higher quality services. However, in this process it has invested in its staff and business such that in 1998 it was a finalist in the Australian Quality Awards for Business Excellence. How has it achieved business excellence and an IiP standards award in this climate?

KEY TURNING POINTS

People had attention paid to them.

The Business Excellence Award and Investor in People recognition is the outcome of a more than ten-year process of staff development and strategically well-managed change. University

Librarian, Felicity McGregor (effectively the CEO), who has worked in the University library for 25 years, describes her early years in the setting as 'dreadful'. When she was appointed Deputy and later Chief Librarian, she already had a strong commitment to staff development as a path to organisational transformation and change. It was time to live out her convictions.

> *When we started with staff training more than a decade ago, it was not within a conceptual framework. We started with a plan and with a focus to put that plan in place. There wasn't much good material around and we just used what we could get our hands on. Looking back on those days now I see that probably what mattered more than anything was that people had attention paid to them.*

Performance was linked to staff development.

> *Beyond that early plan, a second key turning point came when we started evaluating people's performance—performance appraisal we called it then. We had to link performance somehow with staff development. In the 1980s we had a hard job doing this. Now it seems so obvious to link and target professional development with performance management. But back then it wasn't so clear. We were the first Australian library to implement performance management.*
>
> *Now training needs are linked specifically to staff learning plans, the review process and developmental evaluations. Staff have the opportunity to identify what they need for their stage of development to link this with returns to their current or anticipated work settings and the library as a whole. Performance management meant we had an obligation to all staff - supervisors and workers.*

We focused on 'growing our own' capacity.

> *We 'discovered' the importance of having an effective recruitment process to gain and develop staff with attitudes and work approaches congruent with our Library aims. We revised our staff selection processes and ways of collecting information from referees. We appointed people who welcomed change and were not afraid to experiment.*
>
> *From that base, we focus as much as we can on 'growing our own' capacity. Getting Level 7s and 8s - that is, highly qualified and skilled library staff - is nearly impossible. Hiring Level 2 workers where little or no formal qualification is much easier. By offering a range of programs to staff, together with opportunities for them to act in different and more senior positions which they may then apply for, we see how staff perform in the work place and offer them opportunities for growth. We've called this 'job enrichment'.*
>
> *We offer a range of professional development programs in-house.. In planning we keep focusing on our strategic initiatives or sooner or later we will fall off the pace. You cannot afford to be complacent or you start going backwards. I see the investment in PD as real value for money. Even though the budget is small, we have made it work effectively for the whole library.*
>
> *Now we have a critical mass of employees—much of this capacity developed through our team training programs—that embrace change and we've been able to develop further from there. Initially, of course, there were many people who opposed the processes involved in being placed within work teams. But we also recognised that it was important to allow staff time to work through the issues that were important to them. We learned we had to set aside time to deal with individual issues and allow workers time to be heard.*

Rodney Horan described his experience of working, and learning, at the Library this way:

> *We all have team-building training. Other members of the team know it is their job to help you adjust and manage in new settings. Along with that there are systems in place to support a new team member. We all realise what it's like for them so we help them learn what they have to do. Teams*

> *have checklists to work from, without them we would assume a lot of knowledge. It's the same with everything. You get so used to doing a job you quickly forget what it is like for someone coming in new.*

Everyone has responsibility for being a conduit for communication.
As Felicity McGregor explains:

> *I see my role as the Chief Librarian as one where I have to communicate value to my team. I do this through email, identifying reports that I find and posting them on our Intranet, or circulating other reports for comment and discussion. The communication effort is a huge one. We are fortunate in library and information areas to have very good professional bodies and I use these sources to keep up to date myself on the key issues in our field. But I also rely on my senior managers to assist me within their areas of expertise.*
>
> *I spend time sifting out information that comes from CAUL (professional body for university librarians) and ask myself: Who would benefit from having this information? Then I pass it on. I'm a conduit, but then I expect the staff to do the same thing.*

INDICATORS OF ORGANISATIONAL LEARNING WITHIN THE LIBRARY

Learning opportunities exist for staff at every level of the organisation.
Ten to fifteen years ago staff saw little need for training and development. Four years ago, the Library (as part of its quality processes) identified the training and courses they needed for quality management and improvement. From this exercise came core training modules on team building, quality awareness and customer service, together with new modules on information literacy and IT'up-skilling' to manage new demands such as data base management and on line searching.

Lorraine Denny's (Staff Development Officer) recent personal staff development has focussed on creative training techniques and training-to-train through activities that extend her skill base. The 'Training to Train' program has involved participants committing to something that paralleled an aspect of training that they wished to develop. They might therefore undertake Tae Kwon Do in order to mirror in their work environment a particular aspect such as flexibility or alertness to the unexpected. Other participants in this course undertook theatre sports and acting to learn to improvise and develop better verbal fluency. Lorraine observes that:

> *Training is an expectation of all staff, although we do not make it compulsory. Library management provides strong support for all training. We encourage staff to attend and emphasise the link between training and the achieving Library goals and expectations. This may include personal emails to staff who would benefit from the training or who have identified the need for the training in their learning plans.*
>
> *Much of the learning has to be on the job especially in lending services and this is where the value of strong and effective teams can be seen. Although we are investigating developing some courses online through the Internet, many staff want training to be face-to-face and to have contact with other staff. They learn so much from one another.*

Experimentation, risk taking and learning from performance are encouraged.
Sectional teams each have action plans. The team action plan identifies specific actions (including training needs) linked to the Library's goals and objectives. Recently, one sectional team could not secure a team leader. So a team member suggested that they trial operating as a self-managing team. While the team was successful in meeting team goals and targets, a number of issues arose. For example, it was difficult to identify which team member other teams should approach. Now the Library is about to formally appoint a team leader. However, staff are not daunted by the fact that this experiment has not been continued.

Nor do they see it as impossible to develop a self-managing team. They have seen the process as a challenge, and not a defeat.

The Staff Training and Development Committee, and Lorraine Denny in particular, are currently focussing on courses in creativity. Why? Because they believe that their staff are inherently creative, but may have lost touch with some of that capacity. They want to see if they can enhance creativity for the organisation to produce transformational changes rather than just incremental ones. They believe that this may be possible by mobilising different thinking styles using a'think-outside-the-square-you're-in' approach. Such initiatives are designed to provide further links between training and quality improvement.

Senior staff use their networks to identify a wide range of learning opportunities.
Since moving into the role of University Librarian Felicity McGregor has had'a lot of catching up to do especially in the changing area of publishing online and sustainability'. She uses both her professional networks and professional mentors to assist in this task.
Other senior staff also use professional networks to identify the very best providers and opportunities here and overseas.

There is a firm staff development budget and careful thought is given to its allocation.

> *We work from a small budget of around $40 000 each year for all needs including attendance at overseas and national conferences. So we have to be very careful about how and where we spend this money. We also receive about $2 000-3 000 for staff development from the Career Development Unit. This allocated budget has to cover fees for outside consultants, external training, resources and incidental costs. So we have to review the return on conference and training attendance to see what value individuals and the library will get for this large expenditure. While the budget is not increasing, it is dedicated to this purpose. (Lorraine Denny)*

Staff are encouraged to create their own opportunities but these are then supported financially and through some time release. Throughout the interviews, came the stories of staff who joined the library with no experience in the library sector who have created their own career tracks and opportunities with the assistance of the library's staff development opportunities and job enrichment/staffing policies.

Traci Webb, now the manager of Resource Services, is in her eighth year with the Library. Early on in her employment she saw possibilities in IT. She was up front with management about the staff IT skills she thought the Library would need and how she could develop her own skills and experience to assist the Library to meet these new demands. A Systems Support Officer development opportunity was realised which later was reclassified as a permanent position. In addition to this role, Traci supported herself through TAFE and continues university study outside of work hours. Having completed her Associate Diploma in Library Practice, she is now undertaking an undergraduate degree (via distance education) in Library and Information Science with a Commerce major.

What were the driving forces for her undertaking training and professional development? In 1992 Traci describes herself as

> *… daunted by IT and I had to tackle this attitude. When I got involved through training in the technology I found it wasn't as bad as I had feared. Then in 1993 I attended a course in Career Planning and I could see some scope for my career. I didn't have high expectations of the Library in terms on long-term job satisfaction when I first commenced employment. I thought I'd get bored. Thankfully there are interesting and changing roles and responsibilities for staff who want to rise to a challenge and get involved.*

Opportunities to learn from team project management.

Traci's career thinking was also shaped early on when she had an opportunity to lead a project team.

> *I've learned that projects are a huge developmental opportunity. They take you in all sorts of unforeseen directions as well as consolidating and developing existing skills and experience.*
>
> *One of the biggest changes for me came when I was a general library assistant and volunteered to lead a project team (which included senior management) on TQM. From being a twelve month project team it became a standing committee. No one said 'you can't do this you're only a Level 2'. They gave me the encouragement to try and take some risks. I also gained support from team members' experience to see it through. It was very demanding for me. I had to prepare for and run meetings, as well as learn about TQM because I was no expert. I learned to implement facilitation and project management processes and to prepare documentation. I got lots of ideas from members of the team whom I also bounced ideas off. The team gave me constructive feedback. I know it was a major learning opportunity. They were very forgiving and the experience resulted in my improved self-confidence.*

Opportunities for job enrichment

The job enrichment program offers staff opportunities to apply to work elsewhere in the Library in temporary vacancies and vacated positions. Maternity leave has provided many opportunities for staff to 'act-up.' During this time they have a chance to develop new skills, see what a different area of work entails and to apply for that job, should it become permanently available. But it is also made clear that there are no guarantees. If the original employee returns to the post, the secondee returns to their substantive post. Following a resignation, each post is formally advertised and with open competition for the post.

Staff identified the learning value of job enrichment as follows:

- it's a chance to test out employees in a range of new posts without much risk;
- employees gain new experience, variety, skills and knowledge of work mates throughout the library;
- it is a way to test the effectiveness of many work-based practices and philosophies. If they don't work, then there is a way to fix them;
- there are flexible work teams who have an opportunity to try out what they have learned;
- the Library develops a highly multiskilled work force of people who truly understand the others sections of the library.

Opportunities to develop creative ideas

A current focus within the Library is to encourage staff to solve problems creatively. Staff are offered incentives both to devise solutions and to identify ways in which these solutions might be applied elsewhere in the Library and University.

The Library wished to encourage community membership, for example. Wollongong residents clearly appreciated this opportunity and turned up to enrol after work only to find that the University cashier's office closed earlier in the day. One Library staff member thought of Australia Post. Why not ask them to act as a payment point? This would extend both the hours and locations that community members could use to pay the joining fee.

When the ideas was circulated more widely through the Library, someone suggested that the same system could be used for students to pay outstanding fines for overdue books. Since students are unable to access their end of semester results if they have debts outstanding, they could clear these debts regardless of where they might be working or on vacation. The idea was quickly picked up and applied in other areas of the University.